© THE QUEEN'S PRINTER FOR ONTARIO
1999

REPRODUCED WITH PERMISSION

L'IMPRIMEUR DE LA REINE POUR L'ONTARIO

REPRODUIT AVEC PERMISSION

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel: (416) 362-5211
Toll free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

ontario tourism 1999/2000 Marketing Plan

table of contents

100-04599/

3 **background**

7 **strategic overview**
7 Product strategy
8 Objectives
9 Marketing plan overview

12 **marketing programs**

A

A.1 Customer profile
A.2 Product Profile
A.4 Marketing focus
A.5 Partnership Opportunities
A.5 Advertising/ media plan
A.7 Industry initiatives/ Travel trade, media
A.12 Program schedule/ blocking chart

B **united states and the americas**

B.1 Customer profile
B.2 Product Profile
B.4 Marketing focus
B.6 Partnership Opportunities
B.6 Advertising/ media plan
B.9 Industry initiatives/ Travel trade, media
B.14 Program schedule/ blocking chart

C

C.1 Customer profile
C.3 Product Profile
C.4 Marketing focus
C.5 Partnership Opportunities
C.5 Advertising/ media plan
C.9 Industry initiatives/ Travel trade, media
C.11 Program schedule/ blocking chart

D **asia pacific**

D.1 Customer profile
D.3 Product Profile
D.5 Marketing focus
D.6 Partnership Opportunities
D.6 Advertising/ media plan
D.9 Industry initiatives/ Travel trade, media
D.13 Program schedule/ blocking chart

E

E.1 Goals, Objectives and Strategy
E.3 Cross-market programs
E.8 Program schedule/ blocking chart

background

Ontario's Tourism Market Share: Much More to Discover...

Tourism is big business throughout the world and it's getting bigger: Worldwide tourism-based revenue is expected to triple, to US$1.5 trillion, over the coming decade. Virtually every region in the world is investing in tourism infrastructure and programs, and the competition among countries, regions and individual operators is getting increasingly aggressive. Tourism is driven by customers, not sellers, and today's consumers are more sophisticated and demanding than ever. They're also less easy to categorize, identify and quantify, therefore it's more challenging for marketers to reach them. In most areas of the world, consumers in the major tourism market segments are better educated, more affluent, more adventurous, older – and they're becoming more selective and demanding in their choice of vacation destinations and activities.

All of this points to significant growth opportunities for Ontario and its diverse tourism industry. Tourism is Ontario's fifth largest export industry, generating over $13 billion for the provincial economy and employing over 400,000 people. By increasing its market share through a more strategic and cohesive approach to marketing, Ontario's tourism industry has the potential to get much bigger.

The fact remains, however, that Ontario tourism has been losing ground. Since the late 1980s, the province's share of worldwide tourism receipts has fallen from 1.5% to 0.96%. In part, this was a result of declining public sector investments in tourism marketing – from $26 million in 1990-91 to $10.8 million in 1996-97, a reduction of almost 60% – at a time when most other provinces and competing US and foreign jurisdictions stepped up their marketing efforts aggressively. A second major factor was the lack of effective coordination and collaboration between public and private sector marketing and promotion. This has resulted in program duplication, fragmentation and dilution, and an overall lack of consensus among Ontario's tourism stakeholders.

Through a variety of efforts undertaken by the private and public sector, both separately and collectively, each of these key constraints has been addressed. Starting in 1998-99, the Ontario government approved recommendations of an industry-government tourism task force: first, by committing $120 million to tourism marketing over four years. Second, and equally important, the province's tourism marketing programs have been redesigned with the aim of facilitating the development of an effective public-private sector business partnership. Increasingly, as this partnership takes form and shape over the coming months, private sector input, collaboration and leadership will provide the driving force for an exciting and powerful new marketing system.

Industry Vision: A Working Partnership That Really Works

For Ontario's private and public tourism sectors alike, the 1999 marketing plan represents a turning point in the approach and strategic focus with which Ontario tourism will be marketed and promoted throughout the world.

In 1999, as a transition towards fully research-driven marketing strategies, Ontario Tourism has led the development of this year's marketing plan, working in conjunction with tourism associations and business operators. To make the plan more responsive and more flexible, Ontario Tourism will continue to rely on active industry participation and input throughout the year. In subsequent years, direction and leadership of the public-private sector partnership will be primarily industry-based. Programs will be developed and initiated through the Ontario Tourism Marketing Partnership, to be established in April 1999; the partnership will comprise a cross-section of business leaders and stakeholders representing all facets and regions of Ontario's tourism industry. To better accommodate the planning requirements of the industry, this year's marketing plan applies to the full calendar year, rather than the Ministry's fiscal year, and provides operators with more lead time for planning and implementation. Expectations are that as industry takes proactive leadership in the Ontario Tourism Marketing Partnership, this plan will evolve to address newly identified opportunities.

The 1999 marketing plan reflects the investment strategy proposed initially by the Tourism Marketing Task Force, which focuses on three key components:

- Increased year-round domestic and US advertising campaigns
- Development of new small-scale events in response to high demand niche market opportunities
- Accountability: Ongoing tracking and measurement of program performance and return on investment

A New Process

In 1999, public funding support of private sector initiatives will provide for a fee-for-service approach in selected cases. Industry partners, including the Ontario Travel Association Program (OTAP) and other associations, organizations and private consortia, will have the opportunity to bring tourism investors into a variety of private-public partnership marketing programs. These programs will include those listed in the province's 1999 marketing plan, as well as new proposals initiated by OTAPs and private stakeholders. (For further information, contact Narvin Singh, 416-325-2761).

A New, Hands-on Approach

The 1999 marketing plan is designed to serve as a practical working tool that will assist tourism operators and stakeholders in the development, planning and execution of their respective 1999 marketing programs.

Tie-in and Buy-in

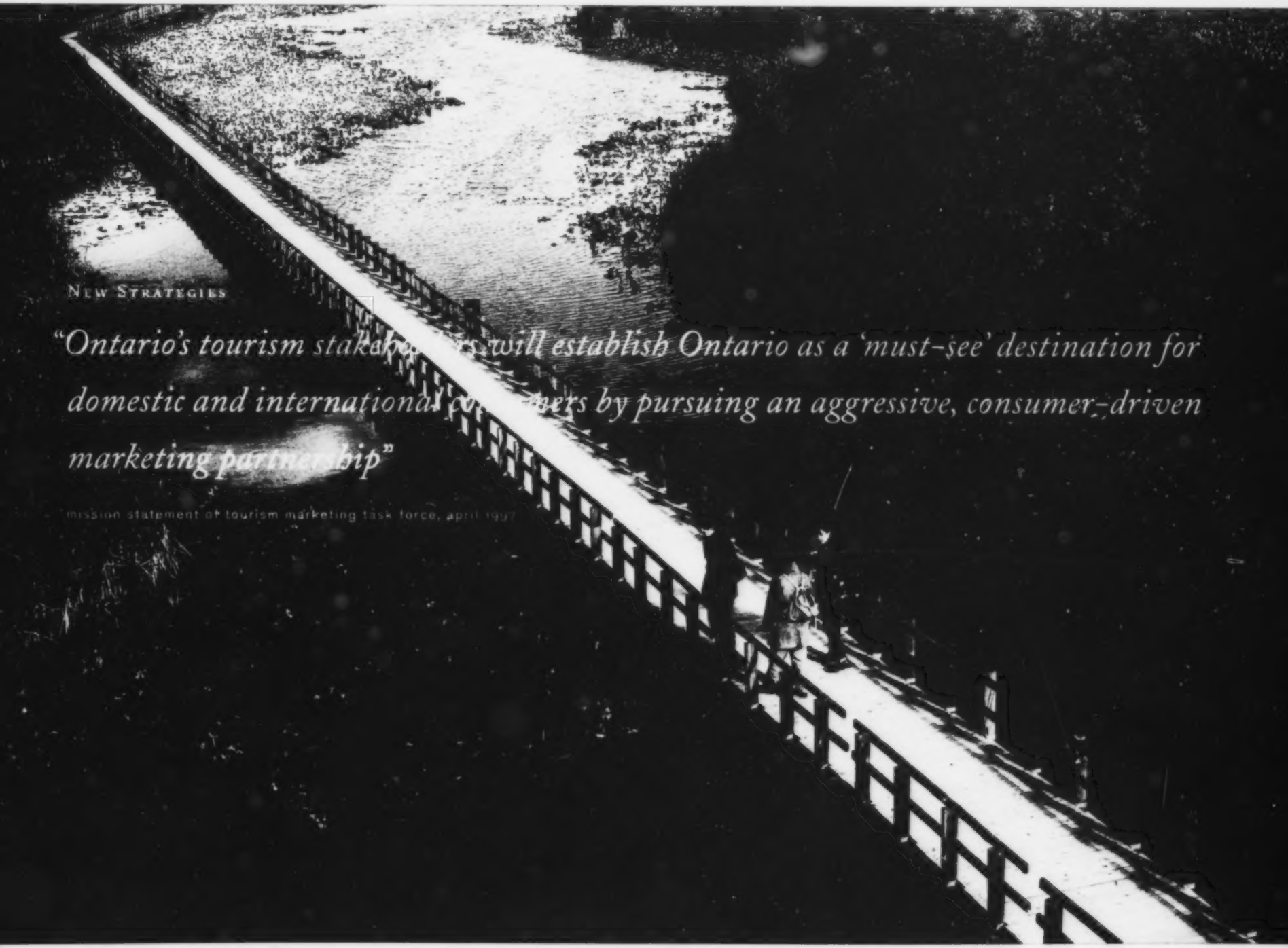
The marketing plan provides details on the province's existing and proposed programs, including program schedules, production logistics, booking requirements and notional cost parameters. Included are planning charts and worksheets that will make it easier to identify and assess each program, and to select, cost out, sign on, or simply find more information about each element of interest.

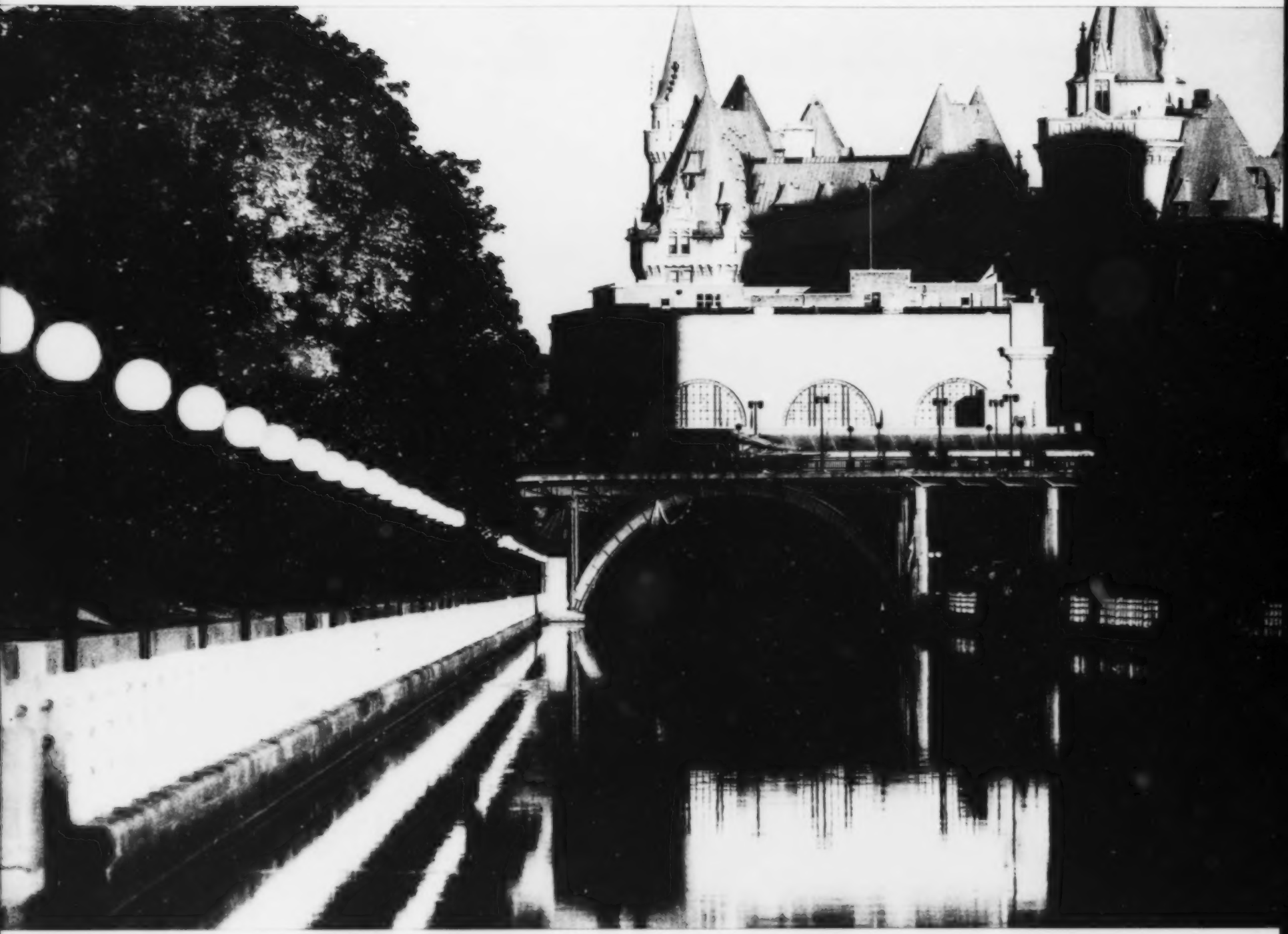
New Ideas Welcome, New Proposals Invited

All tourism-related business operators are encouraged to propose new programs and products for inclusion in the 1999 marketing plan – particularly in partnership with other private and public sector organizations. Since this plan represents the transition from public to private sector orientation, it will be aimed essentially at providing program flexibility, access and latitude.

Staying in the Loop

The 1999 marketing plan will evolve throughout the year as new initiatives are introduced and existing programs are adjusted and fine-tuned in response to customer and industry feedback. Ontario Tourism will keep tourism operators up to date on new developments as they emerge. Ongoing communication and collaboration are key to enhancing the opportunities for all stakeholders to take full advantage of the programs that will help them succeed and grow their business.


NEW STRATEGIES
"Ontario's tourism stakeholders will establish Ontario as a 'must-see' destination for domestic and international consumers by pursuing an aggressive, consumer-driven marketing partnership"
mission statement of tourism marketing task force, april 1997



strategic overview

Ontario's tourism industry had an excellent year in 1998. Overall trips to Ontario (80+ km) increased in the first two quarters by 16.1% over the same period in 1997. The number of Ontario residents taking an overnight trip in the province jumped by 24.6% during the first two quarters of this year.

In the first three quarters of 1998, overnight US border crossings into Ontario rose to 6.49 million visitors – over 11% higher than in the same period last year. Overall international travel to Ontario increased relative to 1997. These gains were made despite declines from overseas markets that resulted from regional financial crises in Asia Pacific markets, as well as the economic restructuring underway in western Europe.

Clearly these increases are a reflection of the decline of the Canadian dollar against its US counterpart, but the industry's gains are also due in part to the re-introduction of Ontario Tourism's domestic advertising and marketing activities. Aided recall of the domestic market's advertising campaign increased from 56% pre-wave in April to 71% post-wave in July and October. This campaign was right on strategy, as 72% of the target market population (Adults, 25+) were targeted through Ontario Tourism's media buys. Inquiries via 1-800-ONTARIO increased by 3.3% – to almost 630,000 calls – over the first ten months of the year. From April to October, over 30,000 callers specifically identified Ontario Tourism ads as the reason for calling. Visits to Travel Information Centres increased 13.6% over the first ten months of 1998 compared to the same period in 1997.

For 1999, the second year of the province's four year commitment to invest $120 million in marketing, Ontario Tourism will continue to market aggressively, working in partnership with tourism-related businesses and key international operators. The goal for 1999 is to achieve revenue increases from pleasure travellers averaging 3% in North American markets, and to minimize erosion and maintain market share from overseas markets that are experiencing economic downturns.

These efforts and investments are critical to rebuilding the province's market share and re-establishing Ontario's image as a must-see destination – among Ontarians, other Canadians, Americans, and other travellers throughout the world. The foundation for achieving these goals will be to build strong partnerships that will focus, strengthen and unify all marketing and promotional initiatives, and target and procure more lucrative customers.

Product strategy

To increase competitiveness and consumer appeal, Ontario Tourism has worked in consultation with industry to package existing products and develop new ones providing greater appeal to target audiences. Supported by comprehensive consumer research, these product offerings, and the resulting marketing initiatives set out in this year's plan, will be organized around the promotion and delivery of three core product lines: City, Touring, and Outdoors.

These product lines encompass the three types of travel experiences in highest demand among Ontario's target audiences, and they provide an ideal context for presenting Ontario's highly diverse product offerings in a clear, simple and highly focused manner. This approach also enhances the central marketing theme – Ontario: More to Discover – and will enable all tourism operators to position their products within a broad, yet well-designed framework that showcases "the best of Ontario."

ONTARIO
CANADA
More to discover

Ontario Tourism's brand theme encourages travellers to visit and stay in Ontario and discover its wonders. Research shows that consumers – especially families – are becoming more price-, value- and safety-conscious. They are attracted to a range of activities, sights and events. With that in mind, Ontario Tourism's brand positioning is intended to acquaint all visitors, domestic and international, with the excellent variety and diversity of what an Ontario vacation has to offer.

Ontario Tourism's Advertising & Communications Agencies

Ontario Tourism's agencies of record are as follow

BBDO (International advertising)
Contact Kevin Callahan, 416-972-1505

Axmith, McIntyre and Wicht (Domestic market advertising)
Contact Cheryl Penman, 416-484-6000

Fuel Inc. (publications)
Contact Lynne Fraser, 416-484-6565

Objectives

Ontario Tourism's 1999 marketing strategy is customer-focused and market-driven. It is based on consumer research resulting in the selection and analysis of target audiences in each of its four markets. In addition to its market research, Ontario Tourism has worked with industry to re-focus Ontario's product strengths and re-evaluate how best to package and present these diverse choices to prospective visitors.

In 1999, Ontario Tourism will pursue key marketing objectives:

- Develop strategies and tactics based on comprehensive consumer research to identify and target priority business opportunities
- Focus marketing efforts on increasing the number of overnight trips – primarily converting US and overseas day trips – due to high revenue potential
- Focus on high yield international markets with private sector partners in Canadian Tourism Commission programs
- Work with industry to package existing products and develop new ones, e.g., events
- Partner with industry to market Ontario aggressively to its residents and international consumers
- Expand private sector partnerships to leverage more marketing dollars
- Maximize the amount of unpaid media exposure to generate awareness and convince consumers to choose Ontario
- Enhance the delivery of travel information – 1-800-ONTARIO, Travel Information Centres, and the Internet
- Reduce the cost of all publications by aggressively increasing advertising

Marketing plan overview

Domestic Markets

For Ontario's domestic markets, the marketing plan focuses on increasing consumer awareness of many more exciting products, building on Ontario's strengths and promoting the diversity of events and destinations that the province has to offer. The major objective is to encourage more Ontario residents to vacation longer and more frequently within Ontario. The exchange for foreign currencies provides an important opportunity to promote the economic benefits of vacationing in Canada, and provides a strong foundation for ensuring that more people choose Ontario. Accordingly, media and promotional programs will take a hard-sell approach to reaching Ontario residents, i.e., 'everything people want is here and the choices are exciting.' The total focus of the domestic marketing plan will be to highlight and emphasize specific travel experiences and product diversity: "Ontario: More to Discover!" Media advertising will focus not only on new, unique and 'undiscovered' experiences, but will also be used to promote greater shoulder and winter season travel more aggressively.

Focusing primarily on Ontario, with Manitoba and Quebec as the key secondary markets, Ontario Tourism will increase residents' predisposition to vacation at home by building on the momentum of its successful 1998 paid advertising campaign. Product positioning will be strengthened through packaging and new product development. The message – 'all you need is right here and is exciting' – will be emphasized throughout both paid and unpaid media exposure and all other promotional resources and activities. New partnering initiatives will focus on developing and promoting niche market opportunities, including new and repackaged destinations and travel experiences, and will continue to emphasize uniqueness, diversity and value. Priority will be given to those partnership proposals that focus on increasing efforts to promote shoulder and winter season activities and events.

The 1999 plan's media strategy will build on the successes of 1998 – namely, through television, radio, and newspaper (inserts and banner ads). Partnering initiatives will include co-op advertising, consumer promotions (for example, coupons, prize give-aways), trade promotions, increased unpaid media exposure and industry-led event marketing, such as festivals and unique events.

United States and the Americas

To increase travel to Ontario from the primary US market, the 1999 marketing plan focuses aggressively on short- and medium haul-markets (Michigan, New York, Ohio, Pennsylvania, Illinois, Minnesota and Wisconsin). The marketing strategy is designed to reach selected target audiences with an exciting array of product choices for each season and type of travel experience. Consumer advertising will consistently emphasize the value, accessibility and safety of vacationing in Ontario, and will promote the province as a unique, must-see destination. Long-haul market opportunities will also be pursued. Following the lead of CTC, Ontario Tourism will seek to leverage CTC funding opportunities, and to extend this funding on a strategic basis.

Primary media will include television (spring, fall), newspaper (CTC inserts/ January, April-May, and August-September), and in border-state inserts in conjunction with the Ontario domestic campaign (January, May). Several niche markets will be also pursued, primarily aimed at outdoor adventure enthusiasts, avid anglers and snowmobilers by way of specialty magazines and direct mail. Ontario Tourism will also target the American Automobile Association (AAA) as a key partner, and will undertake joint initiatives with the CTC on a strategic basis.

In long-haul markets (major urban centres with direct flights to Ontario cities), Ontario Tourism's goal is to build more consumer awareness and interest. This increased awareness will be monitored through the number of travel information inquiries and requests. Ontario Tourism will focus on the enormous variety of world-class, one-of-a-kind events, experiences and destinations within Ontario's three core product lines. In long-haul US markets, the goal is to increase sales and development of packages and programs through the US travel trade. A key objective is to establish and strengthen Ontario's presence among US tour operators and wholesalers. Ontario Tourism will also launch a long-haul test market campaign to assess consumer interest and evaluate the feasibility of future partner participation. An important component in supporting all US marketing initiatives is unpaid media coverage in large urban markets and in high profile consumer magazines.

Europe

At present, most economies in Europe are undergoing restructuring to facilitate the introduction of the 'Euro' currency standard. Despite recent declines in visitations from Europe, with the UK being the exception, Ontario Tourism is seeking to maintain its current market share – both to minimize further erosion and to ensure Ontario is positioned favourably when the 'Euro' is adopted and European economies begin to recover.

Ontario Tourism will expand its programs in the primary markets of the United Kingdom, Germany, and, to a lesser extent, France. The focus of these programs will be on converting awareness of Ontario into purchase decisions.

The marketing plan calls for greater emphasis on building and facilitating strategic, long-term partnerships with industry stakeholders and with the international travel trade and media. Working with airlines, receptive operators, tour operators and others, Ontario Tourism will seek to increase the range and diversity of packaged product carried by operators selling North American travel product. Educational initiatives, such as familiarization tours, targeting the travel trade and media, will be increased in order to improve the understanding of Ontario's unique, multi-season product lines. Increased unpaid media exposure and media relations initiatives (news releases, press tours) will focus on building greater awareness of Ontario among travel journalists.

Ontario Tourism's strategy will include partnering in a CTC television campaign in the United Kingdom (Dec 98-Jan 99), Germany (Mar 99) and France (Apr 99), with Ontario Tourism buying 15-20 second portions of CTC's 90-second spots. Consumer publications will be provided to European tour operators and wholesalers for direct-to-consumer campaigns focusing on short-term sales of specific products. In the UK and Germany, direct mail will promote winter/shoulder/late fall 1999. In addition, mailhouse support will be used year-round in UK and Germany, where partners' promotional material will be distributed locally in response to qualified consumers' inquiries.

Asia Pacific

Despite the widespread financial crises of 1998 and the resulting sharp declines in tourism receipts, Ontario Tourism will seek to maintain its current market share, both as a means to minimize further erosion and to position Ontario favourably as Asian economies recover.

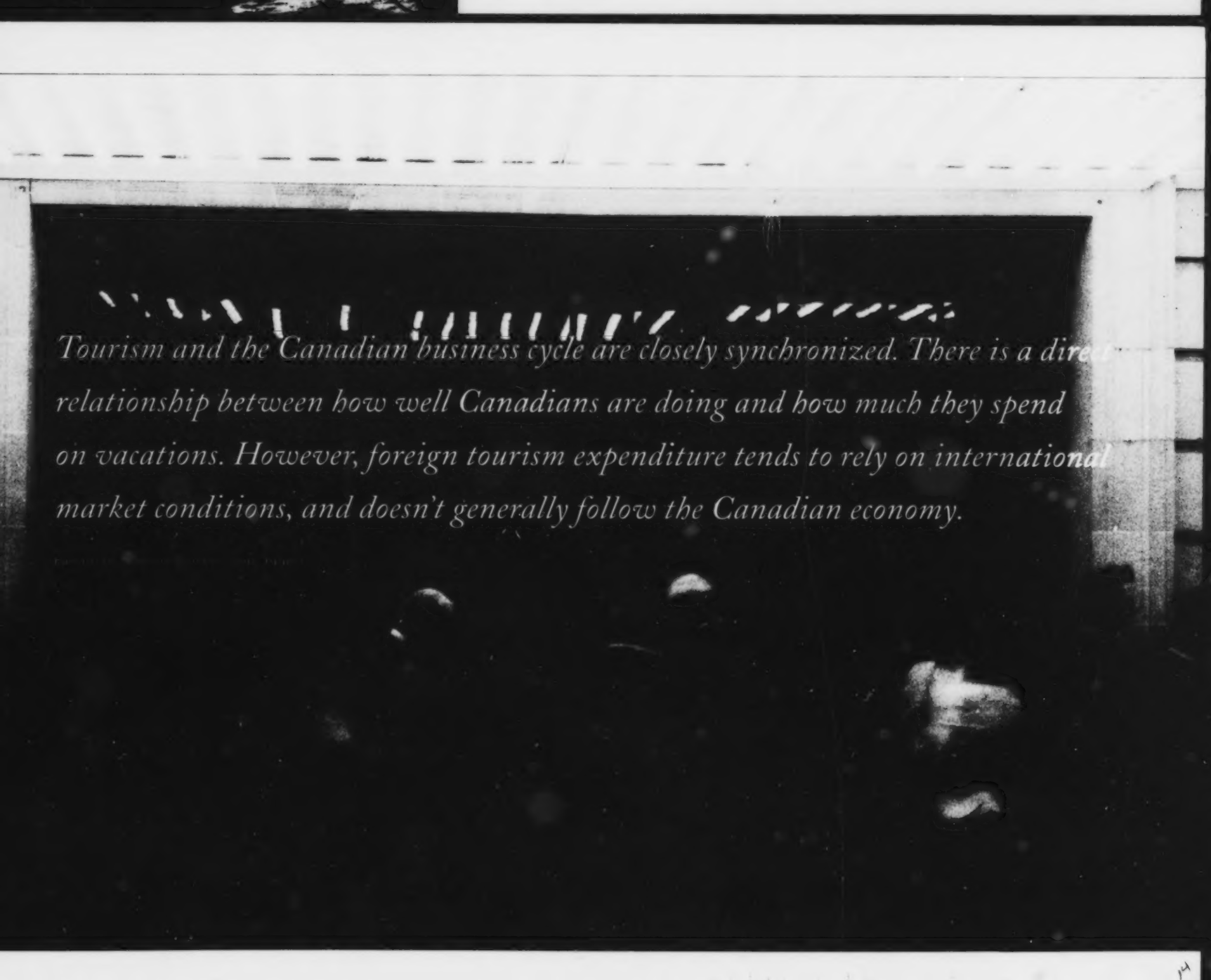
Japan remains Ontario's primary target market, and developing market opportunities will be pursued in Taiwan, Australia, New Zealand and Hong Kong. Marketing strategies will focus on strengthening awareness of Ontario, emphasizing its 'gentle nature' in summer and shoulder seasons, as well as the value and uniqueness of Ontario's tourism products and packages.

In Japan, principal advertising activities will include newspaper campaigns in Japan (Nov 98 to Mar 99), and participation in the CTC's subway poster campaign (distribution and exposure). Ontario Tourism will participate in CTC publications, providing both consumer and trade show distribution throughout Asia Pacific markets. Ontario Tourism will support/participate in industry-driven co-op initiatives, with highest priority given to shoulder and winter seasons. Ontario's presence in these markets will be strengthened through attendance at trade shows and marketplaces, media relations and trade promotions activities. These efforts will focus on the province's core product lines and diverse, multi-season experiences.

Cross-market Programs

Cross-market programs include elements, resources and services that support and complement marketing and promotional activities in each of Ontario's tourism markets. Programs include the development and production of publications, media production support and services (including video footage leasing and photography), travel counselling assistance through Travel Information Centres, call centre support for toll-free calls, website-based fulfilment and promotion support, trade show activities, and market research services.

In 1999, a major focal point is the development of a new publications strategy to support more directly the needs of industry partners, and to complement Ontario Tourism's business-driven, consumer-oriented marketing plan. The publications program emphasizes increased impact, lower unit costs, and improved listing opportunities for tourism operators. The 1999 plan includes a dramatically revamped website to increase its value, functionality and consumer appeal. The new website is expected to become the tourism 'gateway' to Ontario – a primary fulfilment service and an integral adjunct to all other communications and promotional activities. Other key cross-market initiatives in the 1999 marketing plan include increased market research for and with industry partners, media production services, and other initiatives aimed at providing improved services to both consumers and industry partners.



Tourism and the Canadian business cycle are closely synchronized. There is a direct relationship between how well Canadians are doing and how much they spend on vacations. However, foreign tourism expenditure tends to rely on international market conditions, and doesn't generally follow the Canadian economy.

1999/2000 Marketing Programs

Ontario Tourism's marketing programs are centered on promoting the Ontario travel experiences and destinations that will have the greatest appeal to select target audiences in each of the province's four markets: Domestic markets, United States and the Americas, Europe, and the Asia Pacific region. The following summarizes the target audiences, products and marketing initiatives developed for each market.

A

markets

In 1997, total domestic travel volume in Ontario (greater than 40 km, all trip reasons) declined by 8.8% over 1996. Same day trips declined 7.1%, while overnight trips declined 11.6%. In 1998, there has been a tremendous turnaround. Domestic travel is up, outbound travel declined, revpar (revenue per available room rate) is up, and many tourism operators are reporting a successful year.

In 1999, it is expected that the Canadian dollar will remain low relative to the US dollar and other foreign currencies, and this will again keep many Ontarians from vacationing outside of Canada. Despite the instability of world financial markets, unemployment in Ontario is among the lowest in Canada, and consumer confidence remains stable. Disposable income continues to increase in domestic target market segments. As a result, the number of Ontario residents vacationing at home is expected to increase.

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

domestic markets

Customer Profile

Target Audience

Primary target audience: Adults 25+; slight female skew; more frequent and higher-spending travellers.
Emphasis is on adults 25-54, minimum high-school education, with household income of $50K+
Secondary target audience: Adults 55+, minimum high school education, household income of $40K+

Market Segments

Value-oriented Funseekers (VOFs): 34% of market
Younger, family-oriented, value-driven individuals expressing an interest in travelling in Ontario; activity-driven, looking for a multitude of activities, such as festivals and unique events

Outdoor enthusiasts: 22% of market
Similar to VOFs, with preferred activities focusing on outdoors, including both soft and hard adventure

Downtowners: 16% of market
Predominantly 35-54, married, interested in shopping, sightseeing, arts and culture

(Two other secondary market segments, 'Easygoing Seniors' (15% of market) and 'Upscale Explorers' (13% of market), will be targeted on a niche basis)

why ontario?

The following, from a survey of Ontario Residents who travel regularly, lists the most attractive activities in Ontario:

Scenic Drives, Country Inns, Cottages and Resorts, Theatre, Walking/Biking, Festivals, Historic sites, Boat cruises, Wine country touring, City sites, Outdoors/Nature, Bed & Breakfasts

ontario tourism domestic advertising & awareness study, 1998

sources of information for planning a trip to ontario

Newspaper	[illegible]
Word of mouth	[illegible]
Brochures	[illegible]
CAA/Auto club	[illegible]
Friends/family	[illegible]
Travel agency	[illegible]

ontario tourism domestic advertising & awareness study, 1998

domestic markets

Customer Profile

Target Audience

Primary target audience: Adults 25+; slight female skew; more frequent and higher-spending travellers.
Emphasis is on adults 25-54, minimum high-school education, with household income of $50K+
Secondary target audience: Adults 55+, minimum high school education, household income of $40K+

Market Segments

Value-oriented Funseekers (VOFs): 34% of market

Younger, family-oriented, value-driven individuals expressing an interest in travelling in Ontario; activity-driven, looking for a multitude of activities, such as festivals and unique events

Outdoor enthusiasts: 22% of market

Similar to VOFs, with preferred activities focusing on outdoors, including both soft and hard adventure

Downtowners: 16% of market

Predominantly 35-54, married, interested in shopping, sightseeing, arts and culture

(Two other secondary market segments, 'Easygoing Seniors' (15% of market) and 'Upscale Explorers' (13% of market), will be targeted on a niche basis)

why ontario?

The following, from a survey of Ontario Residents who travel regularly, lists the most attractive activities in Ontario:

Scenic Drives, Country Inns, Cottages and Resorts, Theatre, Walking/Biking, Festivals, Historic sites, Boat cruises, Wine country touring, City sites, Outdoors/Nature, Bed & Breakfasts

ontario tourism domestic advertising & awareness study, 1998

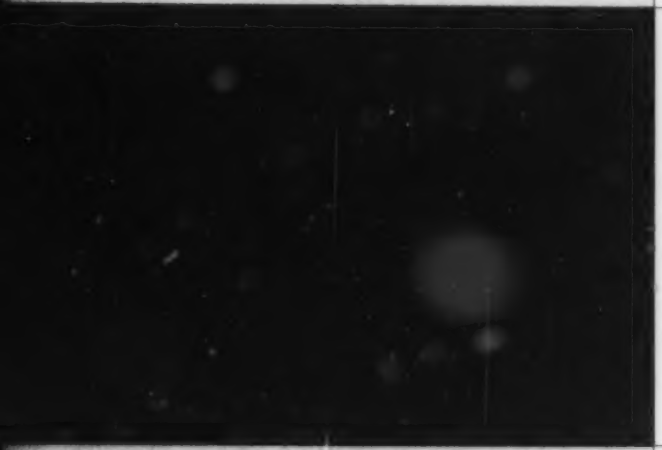
sources of information for planning a trip to ontario

(Figures compare recall on First mention/ Total mention)

Newspaper	17% / 39%
Word of mouth	16% / 26%
Brochures	10% / 22%
CAA/Auto club	9% / 15%
Friends/family	8% / 14%
Travel agency	7% / 12%

ontario tourism domestic advertising & awareness study, 1998

product profile *Note: Product architecture to evolve based on industry's input.

	Winter	Spring
City	**Activities and Experiences** Shopping (pre- and post-Christmas), romance, rest and rejuvenation, dining, education and enrichment **Attractions** Theatre & performing arts, professional sports, indoor and outdoor attractions **Events and Festivals** Consumer shows, winter carnivals, other indoor & outdoor activities	**Activities and Experiences** Shopping, rest and rejuvenation, dining, education and enrichment **Attractions** Theatre & performing arts, professional sports, indoor and outdoor attractions (e.g., Tulip Festival)
	**Festivals** Winter carnivals, lights festivals, maple syrup festivals **Education & enrichment** Wine tasting tours, cooking schools, regional theatre	**Southwest Wine Region** Regional theatre, festivals (e.g., Niagara Blossom festival), Maple syrup festivals **East** Antiques/Heritage, boatlines (open in late May), Maple syrupfestivals **North & Central** Touring product (To be determined)
Outdoor	Potential recreational products for value-oriented family & adult 2-3 day packages providing diversity and variety of experiences – resorts/apres ski, cross-country skiing, recreational snowmobiling, dogsledding, tubing, sleighrides, snowshoeing, snowboarding Niche markets: ice fishing, snowmobiling	Provincial parks (open in May) **North/Central** Sportfishing, wildlife viewing **Southwest/East** Cycling, hiking, birding (e.g., migration, trumpeter swans), Golf and resorts

Summer	Fall
	Events, festivals (e.g., Toronto Film Festival) Attractions, theatre, professional sports
Events and festivals, Unique culture, Cultural heritage Package/thematic attractions (e.g., Ale Trail, Grand River)	
Small towns, unique communities, Walking/hiking routes, Resorts/golf, Provincial parks, Special interest/educational & enrichment, Cruising, Festivals and events	**Southwest** Fall colours, Harvest festivals & fall fairs, Small towns, unique communities, Wine regions, Regional theatre (e.g., Shaw, Stratford) Rail (e.g., St. Jacobs, Port Stanley), Shopping **East** Fall colours, Harvest festivals & fall fairs, Small towns, unique communities, Antiques/heritage, Studio tours, Cruising, Shopping **North** Fall colours, Small towns, unique communities, Studio tours, Shopping, Rail & cruising **Central** Fall colours, Small towns, unique communities, Rail (e.g., Tottenham) Cruising, Fall fairs, Studio tours
Hard adventure, Provincial parks, Wildwater preserve, Ecological adventures, Waterways, Walking/hiking tours, Resorts and golf	**North** Hiking/walking tours, Wildlife viewing, Fishing and hunting Camping, Canoeing/kayaking, Golf, Provincial parks **Southwest/East** Cycling/hiking/walking tours, Birding (e.g., migration), Golf, Provincial parks **Central** Hiking, Golfing

product profile *Note: Product architecture to evolve based on industry's input.

	Winter	Spring
City	**Activities and Experiences** Shopping (pre- and post-Christmas), romance, rest and rejuvenation, dining, education and enrichment **Attractions** Theatre & performing arts, professional sports, indoor and outdoor attractions **Events and Festivals** Consumer shows, winter carnivals, other indoor & outdoor activities	**Activities and Experiences** Shopping, rest and rejuvenation, dining, education and enrichment **Attractions** Theatre & performing arts, professional sports, indoor and outdoor attractions (e.g., Tulip Festival)
	Festivals Winter carnivals, lights festivals, maple syrup festivals **Education & enrichment** Wine tasting tours, cooking schools, regional theatre	**Southwest Wine Region** Regional theatre, festivals (e.g., Niagara Blossom festival), Maple syrup festivals **East** Antiques/Heritage, boatlines (open in late May), Maple syrupfestivals **North & Central** Touring product (To be determined)
Outdoor	Potential recreational products for value-oriented family & adult 2-3 day packages providing diversity and variety of experiences – resorts/apres ski, cross-country skiing, recreational snowmobiling, dogsledding, tubing, sleighrides, snowshoeing, snowboarding Niche markets: ice fishing, snowmobiling	Provincial parks (open in May) **North/Central** Sportfishing, wildlife viewing **Southwest/East** Cycling, hiking, birding (e.g., migration, trumpeter swans), Golf and resorts

Summer	Fall
	Events, festivals (e.g., Toronto Film Festival) Attractions, theatre, professional sports
Events and festivals, Unique culture, Cultural heritage Package/thematic attractions (e.g., Ale Trail, Grand River)	
Small towns, unique communities, Walking/hiking routes, Resorts/golf, Provincial parks, Special interest/educational & enrichment, Cruising, Festivals and events	**Southwest** Fall colours, Harvest festivals & fall fairs, Small towns, unique communities, Wine regions, Regional theatre (e.g., Shaw, Stratford) Rail (e.g., St. Jacobs, Port Stanley), Shopping **East** Fall colours, Harvest festivals & fall fairs, Small towns, unique communities, Antiques/heritage, Studio tours, Cruising, Shopping **North** Fall colours, Small towns, unique communities, Studio tours, Shopping, Rail & cruising **Central** Fall colours, Small towns, unique communities, Rail (e.g., Tottenham) Cruising, Fall fairs, Studio tours
Hard adventure, Provincial parks, Wildwater preserve, Ecological adventures, Waterways, Walking/hiking tours, Resorts and golf	**North** Hiking/walking tours, Wildlife viewing, Fishing and hunting Camping, Canoeing/kayaking, Golf, Provincial parks **Southwest/East** Cycling/hiking/walking tours, Birding (e.g., migration), Golf, Provincial parks **Central** Hiking, Golfing

A

why not ontario?

A recent consumer research report lists the following reasons given for NOT travelling in Ontario:

- No idea of where to go
- Nothing new or interesting to see in Ontario
- Travelling in Ontario is not really 'getting away from it all'
- Too expensive and concerned about accommodation
- Don't know where to get travel information
- Better shopping and value offered in US
- People in Ontario are less friendly than people in the US
- Ontario is expected to be dull

Many people said we tend to take our province for granted, and that it would be important to be reminded that Ontario has a lot to offer.

ontario tourism consumer research, 1997 & 1998

When promoting domestic getaways, attention should be directed toward the trip experience, not attractions, events or sites.

ontario tourism consumer research

Marketing Strategy

Goals

- Build year-round awareness of Ontario
- Establish Ontario as a year-round value and an excitement-packed destination
- Execute 'Find it all and Experience the Diversity' positioning

Objectives

- Grow same-day and overnight leisure trips and expenditures by 3% over 1998
- Promote day travel that encourages overnight stays
- Promote and strengthen the appeal of Ontario's three main product lines
- Raise 'intention-to-travel' to 80% within target market
- Source new, non-traditional partners
- Raise year-round top-of-mind awareness to 22% of target market
- Grow partnership marketing opportunities – cash and in-kind services

Strategy

Rebuild Ontario's brand image

- Establish year-round, multi-media presence
- Build consumer awareness of the diversity of seasonal experiences and products

Deliver an Integrated Campaign

- Provide common creative positioning across all marketing tactics, with consistent messaging across all activities, including media relations, 1-800 servicing, publications, packages, Internet site and travel trade relations

Focus on Ontario's Three Core Product Lines

- Emphasize diversity of the trip experience
- Differentiate these trip types and how they change from season to season
- Pursue tactical opportunities built around events and festivals

Advertise With Major Ontario Partners

- Strengthen media and public relations
- Synchronize paid and unpaid media exposure through improved media relations, i.e., complementary story ideas, press events

Initiate and Integrate Non-traditional and Government Partnerships

- Involve a cross-section of non-traditional private and public sector partners in collaborative and cross-promotional activities

US Industry Driven Co-op Initiatives

April 1999 – March 2000: Focuses on outdoor recreational product, touring and new, unique & different, with preference for shoulder & winter season; Must be new: new market, medium, product, partnerships
As identified in proposals
Consumer awareness of Ontario's product strengths; Increased purchases of Ontario Tourism product
Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); Details on program will be available by February 26, 1999; Initiative should be fully integrated to raise and fulfil interest, and can include advertising, (trade, consumer or media) or any combination; Approval of proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis; Consideration will be given to CTC programs in which the Province has not participated.
Suggested minimum funding for individual initiatives: $25,000; Matching contributions will be available from the Province, i.e., Industry will pay a minimum of $12,500 per initiative
Applications must be received at least 4 months prior to commencement of the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

A

why not ontario?

A recent consumer research report lists the following reasons given for NOT travelling in Ontario:

- No idea of where to go
- Nothing new or interesting to see in Ontario
- Travelling in Ontario is not really 'getting away from it all'
- Too expensive and concerned about accommodation
- Don't know where to get travel information
- Better shopping and value offered in US
- People in Ontario are less friendly than people in the US
- Ontario is expected to be dull

Many people said we tend to take our province for granted, and that it would be important to be reminded that Ontario has a lot to offer.

ontario tourism consumer research, 1997 & 1998

When promoting domestic getaways, attention should be directed toward the trip experience, not attractions, events or sites.

ontario tourism consumer research

Marketing Strategy

Goals

- Build year-round awareness of Ontario
- Establish Ontario as a year-round value and an excitement-packed destination
- Execute 'Find it all and Experience the Diversity' positioning

Objectives

- Grow same-day and overnight leisure trips and expenditures by 3% over 1998
- Promote day travel that encourages overnight stays
- Promote and strengthen the appeal of Ontario's three main product lines
- Raise 'intention-to-travel' to 80% within target market
- Source new, non-traditional partners
- Raise year-round top-of-mind awareness to 22% of target market
- Grow partnership marketing opportunities – cash and in-kind services

Strategy

Rebuild Ontario's brand image

- Establish year-round, multi-media presence
- Build consumer awareness of the diversity of seasonal experiences and products

Deliver an Integrated Campaign

- Provide common creative positioning across all marketing tactics, with consistent messaging across all activities, including media relations, 1-800 servicing, publications, packages, Internet site and travel trade relations

Focus on Ontario's Three Core Product Lines

- Emphasize diversity of the trip experience
- Differentiate these trip types and how they change from season to season
- Pursue tactical opportunities built around events and festivals

Advertise With Major Ontario Partners

- Strengthen media and public relations
- Synchronize paid and unpaid media exposure through improved media relations, i.e., complementary story ideas, press events

Initiate and Integrate Non-traditional and Government Partnerships

- Involve a cross-section of non-traditional private and public sector partners in collaborative and cross-promotional activities

	US Industry Driven Co-op Initiatives
Timing/Product message	**April 1999 – March 2000:** Focuses on outdoor recreational product, touring and new, unique & different, with preference for shoulder & winter season; Must be new: new market, medium, product, partnerships
	As identified in proposals
Expected results	Consumer awareness of Ontario's product strengths; Increased purchases of Ontario Tourism product
	Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); Details on program will be available by February 28, 1999; Initiative should be fully integrated to raise and fulfil interest, and can include advertising, (trade, consumer or media) or any combination; Approval of proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis; Consideration will be given to CTC programs in which the Province has not participated.
Estimated cost	Suggested minimum funding for individual initiatives: $25,000; Matching contributions will be available from the Province, i.e., Industry will pay a minimum of $12,500 per initiative
	Applications must be received at least 4 months prior to commencement of the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners
Contact	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

US/Long Haul Test Market	US Advertising - Avid Angling, Snowmobiling & Outdoor Adventure
Early Spring 1999: Key messaging will focus on persuading consumers to consider an Ontario vacation; Highlights high yield product such as exclusive resorts, unique experiences and product themes (city, touring and outdoor, as identified in product architecture) and high value and exchange rate; Concentration on US major urban/long-haul markets; A fly/drive component will be incorporated; CTC programs concentrate on major US urban long-haul markets; Ontario Tourism participates in CTC programs on a strategic basis	**March-Sept 1999:** Three-phase campaign targets each of three specialty markets to establish Ontario's position as the premier North America destination for outdoor adventure and angling enthusiasts; Highlights high yield product such as exclusive resorts, unique adventure experiences and outdoor product, as well as high value and exchange rate; High value & accessibility would be emphasized; **March-April, November 1999:** CTC Adventure program and Snowmobile program respectively
Test markets to be determined (California is under consideration); Intention is to test the viability of a long-haul market for consumer interest/consideration, as well as to determine partner interest and participation, e.g., air & ground transportation companies, hotel chains & North American tour operators	Campaigns in mid-west states targeted at outdoor adventure consumers, avid anglers and snowmobilers; Media would include vertical publications/specialty magazines, with special editions specifically targeted; Emphasis is on those partners with ability to deliver to close proximity markets; Outdoor and Adventure magazines include: "Outside," "Backpacker," "Canoe & Kayak;" In the snowmobiling market, direct mail and magazine advertising will also be utilized; Avid angling programs include TV and magazine advertising; CTC Adventure program includes magazine advertising (7 key publications); Snowmobile program: direct mail and magazine
Increased consumer awareness; Awareness converted to short & long term decisions/purchases; Increased enquires & bookings for partners; Decision making/purchases facilitated	Decision making/purchases facilitated – consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign, with either CTC or Ontario Tourism leading the initiative: Partner selects media coverage, timing, creative, and tag-on sales pitch for promotional spots; Ontario Tourism provides creative, media selection/purchase; Fulfilment: joint province & partner (possibly CTC): toll-free telephone, Internet, partner brochures & packages; Partner develops/maintains consumer content; Ontario suppliers have opportunity to work with tour operators to get their product into fulfilment brochures	Partner-driven via participation in fulfilment pieces, which would include a new adventure guide, "Ontario's Snow Country" snowmobile publication, and, under consideration, a fishing packages brochure; Partner opportunities include advertorial, display advertising & direct-to-consumer packages; Partners may fulfil consumer requests directly or in partnership with province via 1-800-ONTARIO/website; Information on participation in CTC's adventure & snowmobile programs available on request
Opportunities exist for major partners such as air & ground transportation companies, hotel chains & North American tour operators; Ontario suppliers have opportunity to work with tour operators, on commissioned basis, to get their product into fulfilment brochures	Display advertising in fulfilment piece ranges from $500 to $5,000; Cost for advertorial & direct-to-consumer initiatives would be negotiated as requested and based on availability; CTC Adventure Program: $495-34,000
Initiative would be confirmed by January 1999; Schedule & costs would be released	Opportunities are on a "First Come, First Served" basis; Upon release of details, industry will negotiate/purchase preferred promotional package
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

Newspaper	Newspaper Inserts (Domestic & US border cities)
January 1998 – June 1998: Key messaging will focus on reasons to travel sooner rather than later (e.g., exchange rate and value); Concentration on regional itineraries and product themes (city, touring and outdoor); Fly/drive component will be incorporated in selected markets; Ads to appear in the Sunday travel section; **April-May, Aug-Sep 1998:** CTC inserts in urban markets, highlighting cities, touring & resorts; Other newspaper opportunities to be determined	**May 1998:** Minimum 48 Pages; All-encompassing, multi-experience advertorial; summer & fall **January 2000:** 32 pages (Sales close Aug. 1999); Town & Country, Winter Outdoors, City, Festivals & Events (on a limited basis)
Newspaper ads focus on major dailies in selected short- and mid- haul markets, and potentially, may run year-round to include promotion of shoulder seasons; CTC undertakes activities in San Francisco, Dallas, Boston, New York, Minneapolis	Select dailies across province; Consideration for distribution in Montreal, Quebec, and US border cities
Increased consumer awareness; Increased calls to 1-800-ONTARIO; Decision making/purchases facilitated; Consumers encouraged to extend day trips to overnight, and to extend overnight trips to additional nights	Decision making/purchases facilitated – Consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign: Partner selects timing, media coverage, creative, and specific promotional offer; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website; CTC partnerships promote Ontario within "Canada" context	Partner-driven campaign: Partner has opportunity to promote product(s) throughout Ontario (and potentially Quebec/US border cities); Partner has creative input, placement in insert and direct fulfilment support; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website
Cost will vary by market and frequency (1998/99: for SINGLE Newspaper insertion, price range was US$500 – $2700); To improve impact, recommended minimum of 3 insertions per market; CTC cost identified in "1999/2000 US Leisure Communications Plan"	Varies by size of ad & commitment; Spring Insert: Variety of options, from short listings to full page, select; CPM efficiencies for additional Quebec & US border cities; Options, schedule & cost will be available by December 31, 1998, for spring insert
New program guidelines will be released February 1999; Expression of interest, confirmation & financial commitment would be required 2 months prior to confirmed insertion date	Spring 1999 (Ontario/Quebec/US border: Expression of interest by Feb 15, 1999, with confirmation by Feb 28, 1999; Financial commitment must be received by March 15, 1999; Winter 2000: Timelines to be confirmed by Jan 31, 1999
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca Carol Maxwell: 416-314-7568 E-mail: carol.maxwell@edt.gov.on.ca

US/Long Haul Test Market	US Advertising – Avid Angling, Snowmobiling & Outdoor Adventure
Early Spring 1999: Key messaging will focus on persuading consumers to consider an Ontario vacation; Highlights high yield product such as exclusive resorts, unique experiences and product themes (city, touring and outdoor, as identified in product architecture) and high value and exchange rate; Concentration on US major urban/long-haul markets; A fly/drive component will be incorporated; CTC programs concentrate on major US urban long-haul markets; Ontario Tourism participates in CTC programs on a strategic basis	**March-Sept 1999:** Three-phase campaign targets each of three specialty markets to establish Ontario's position as the premier North America destination for outdoor adventure and angling enthusiasts; Highlights high yield product such as exclusive resorts, unique adventure experiences and outdoor product, as well as high value and exchange rate; High value & accessibility would be emphasized; **March-April, November 1999:** CTC Adventure program and Snowmobile program respectively
Test markets to be determined (California is under consideration); Intention is to test the viability of a long-haul market for consumer interest/consideration, as well as to determine partner interest and participation, e.g., air & ground transportation companies, hotel chains & North American tour operators	Campaigns in mid-west states targeted at outdoor adventure consumers, avid anglers and snowmobilers; Media would include vertical publications/specialty magazines, with special editions specifically targeted; Emphasis is on those partners with ability to deliver to close proximity markets; Outdoor and Adventure magazines include: "Outside," "Backpacker;" "Canoe & Kayak;" In the snowmobiling market, direct mail and magazine advertising will also be utilized; Avid angling programs include TV and magazine advertising; CTC Adventure program includes magazine advertising (7 key publications); Snowmobile program: direct mail and magazine
Increased consumer awareness; Awareness converted to short & long term decisions/purchases; Increased enquires & bookings for partners; Decision making/purchases facilitated	Decision making/purchases facilitated – consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign, with either CTC or Ontario Tourism leading the initiative: Partner selects media coverage, timing, creative, and tag-on sales pitch for promotional spots; Ontario Tourism provides creative, media selection/purchase; Fulfilment: joint province & partner (possibly CTC): toll-free telephone, Internet, partner brochures & packages; Partner develops/maintains consumer contact; Ontario suppliers have opportunity to work with tour operators to get their product into fulfilment brochures	Partner-driven via participation in fulfilment pieces, which would include a new adventure guide, "Ontario's Snow Country" snowmobile publication, and, under consideration, a fishing packages brochure; Partner opportunities include advertorial, display advertising & direct-to-consumer packages; Partners may fulfil consumer requests directly or in partnership with province via 1-800-ONTARIO/website; Information on participation in CTC's adventure & snowmobile programs available on request
Opportunities exist for major partners such as air & ground transportation companies, hotel chains & North American tour operators; Ontario suppliers have opportunity to work with tour operators, on commissioned basis, to get their product into fulfilment brochures	Display advertising in fulfilment piece ranges from $500 to $5,000; Cost for advertorial & direct-to-consumer initiatives would be negotiated as requested and based on availability; CTC Adventure Program: $495-34,000
Initiative would be confirmed by January 1999; Schedule & costs would be released	Opportunities are on a "First Come, First Served" basis; Upon release of details, industry will negotiate/purchase preferred promotional package
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

Newspaper	Newspaper Inserts (Domestic & US border cities)
January 1999 – June 1999: Key messaging will focus on reasons to travel sooner rather than later (e.g., exchange rate and value); Concentration on regional itineraries and product themes (city, touring and outdoor); Fly/drive component will be incorporated in selected markets; Ads to appear in the Sunday travel section; **April-May, Aug-Sep 1999:** CTC inserts in urban markets, highlighting cities, touring & resorts; Other newspaper opportunities to be determined	**May 1999:** Minimum 48 Pages; All-encompassing, multi-experience advertorial; summer & fall **January 2000:** 32 pages (Sales close Aug. 1999); Town & Country, Winter Outdoors, City, Festivals & Events (on a limited basis)
Newspaper ads focus on major dailies in selected short- and mid- haul markets, and potentially, may run year-round to include promotion of shoulder seasons; CTC undertakes activities in San Francisco, Dallas, Boston, New York, Minneapolis	Select dailies across province; Consideration for distribution in Montreal, Quebec, and US border cities
Increased consumer awareness; Increased calls to 1-800-ONTARIO; Decision making/purchases facilitated; Consumers encouraged to extend day trips to overnight, and to extend overnight trips to additional nights	Decision making/purchases facilitated – Consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign: Partner selects timing, media coverage, creative, and specific promotional spot; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website; CTC partnerships promote Ontario within "Canada" context	Partner-driven campaign: Partner has opportunity to promote product(s) throughout Ontario (and potentially Quebec/US border cities); Partner has creative input, placement in insert and direct fulfilment support; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website
Cost will vary by market and frequency (1998/99: for SINGLE Newspaper insertion, price range was US$500 – $2700); To improve impact, recommended minimum of 3 insertions per market; CTC cost identified in "1999/2000 US Leisure Communications Plan"	Varies by size of ad & commitment; Spring Insert: Variety of options, from short listings to full page, select; CPM efficiencies for additional Quebec & US border cities; Options, schedule & cost will be available by December 31, 1998, for spring insert
New program guidelines will be released February 1999; Expression of interest, confirmation & financial commitment would be required 2 months prior to confirmed insertion date	Spring 1999 (Ontario/Quebec/US border: Expression of interest by Feb 15, 1999, with confirmation by Feb 28, 1999; Financial commitment must be received by March 15, 1999; Winter 2000: Timelines to be confirmed by Jan 31, 1999
Mara Pezzutto, 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca Carol Maxwell: 416-314-7568 E-mail: carol.maxwell@edt.gov.on.ca

Spring 1999 & Ongoing: Highlights Ontario touring product.; Program to encompass consumer advertising in AAA publications, consumer/member promotions, travel trade activities with AAA offices, and media relations	**January-December 1999:** Focuses on outdoor recreational product, touring, events & festivals, and new, unique and different products – all of which emphasize "More to Discover;" Messaging will be determined according to product architecture; Vacation value and exchange rate will be emphasized in all activities
AAA offices and publications in the border and short-haul markets, with a view to expanding the program further into the US in future; Program would complement Ontario's core advertising program	All US , with emphasis on medium- and long-haul markets; Major dailies and high-end, niche-market and lifestyle publications; Story ideas supplied to key journalists/media and news distribution services; Memberships will be maintained with SATW and TMAC to ensure access for pitching new tourism story ideas
Increased awareness and choice of Ontario as a destination for AAA members in selected US markets	Increased consumer awareness of Ontario tourism product; Third party endorsement for tourism products; Increase in story ideas picked-up/published; Increased unpaid media coverage
Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); AAA publications & member promotions fulfilment via 1-800-ONTARIO/website and direct consumer contact through partner advertising; Fulfilment via CTC Ontario Touring book directly through AAA, whose editorial is controlled by Ontario & its partners; Consideration will be given for the distribution of additional publications after a one-year review of program	Synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs, and also supply story ideas for broadcast through syndicated broadcast; Partners will have access to province's US media contact database
Partners can negotiate presence in AAA promotional material and submit proposal to Ontario Tourism for consideration; Rate card for 2000 edition of touring book will be available by August 1999; For information on participation in fulfilment through Provincial-led publications, refer to "Cross-Market Programs"	Typically in-kind services, and cash on as-needed basis, negotiated on per project basis
Program details will be available by January 1999	Emphasis on four seasons; Partners can indicate availability of in-kind services and willingness to host tours/events
Sandra Chabot: 519-652-1391 Fax 519-652-0533 E-mail: swota@lonet.ca	Tom Boyd: 416-314-7554 E-mail: tom.boyd@edt.gov.on.ca

Industry-driven Co-op: AAA Initiative	Media Promotions: News Releases, press tours syndicated broadcasts
Spring 1999 & Ongoing: Highlights Ontario touring product.; Program to encompass consumer advertising in AAA publications, consumer/member promotions, travel trade activities with AAA offices, and media relations	**January-December 1999:** Focuses on outdoor recreational product, touring, events & festivals, and new, unique and different products – all of which emphasize "More to Discover;" Messaging will be determined according to product architecture; Vacation value and exchange rate will be emphasized in all activities
AAA offices and publications in the border and short-haul markets, with a view to expanding the program further into the US in future; Program would complement Ontario's core advertising program	All US , with emphasis on medium- and long-haul markets; Major dailies and high-end, niche-market and lifestyle publications; Story ideas supplied to key journalists/media and news distribution services; Memberships will be maintained with SATW and TMAC to ensure access for pitching new tourism story ideas
Increased awareness and choice of Ontario as a destination for AAA members in selected US markets	Increased consumer awareness of Ontario tourism product; Third party endorsement for tourism products; Increase in story ideas picked-up/published; Increased unpaid media coverage
Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); AAA publications & member promotions fulfilment via 1-800-ONTARIO/website and direct consumer contact through partner advertising; Fulfilment via CTC Ontario Touring book directly through AAA, whose editorial is controlled by Ontario & its partners; Consideration will be given for the distribution of additional publications after a one-year review of program	Synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs, and also supply story ideas for broadcast through syndicated broadcast; Partners will have access to province's US media contact database
Partners can negotiate presence in AAA promotional material and submit proposal to Ontario Tourism for consideration; Rate card for 2000 edition of touring book will be available by August 1999; For information on participation in fulfilment through Provincial-led publications, refer to "Cross-Market Programs"	Typically in-kind services, and cash on as-needed basis, negotiated on per project basis
Program details will be available by January 1999	Emphasis on four seasons; Partners can indicate availability of in-kind services and willingness to host tours/events
Sandra Chabot: 519-652-1391 Fax 519-652-0533 E-mail: swota@lonet.ca	Tom Boyd: 416-314-7554 E-mail: tom.boyd@edt.gov.on.ca

ONTARIO

Time to savour the colours.

Including the Reds and the Whites.

Fall. Time to savour the colours of the province, including the Reds and Whites of wine country. Here in the Niagara Peninsula, towns and villages surrender themselves to the art of wine making, and the wineries create a product as memorable as the season itself. Pack the car, bring your Mum, and follow the Wine Route where wineries explain their craft, then invite you to savour the fruit of their labours. Or take what Sir Winston Churchill called the "prettiest Sunday afternoon drive in the world". The Niagara Parkway takes you past historic buildings and Fort during the War of 1812, and beautiful botanical gardens. The region offers other scenic routes perfect for a family drive. The Victoria Canal Route follows canal routes old and new from Port Dalhousie on Lake Ontario to Port Colborne on Lake Erie. The Lake Erie North Shore Route takes you from Port Erie to Windsor, past wineries, historic sites, and Point Pelee, home to the spectacular fall Monarch Butterfly migration. Follow scenic St. Clair

Parkway a delightful drive along the river offering a mosaic of 10 different points. Open a map and start making your plans. With all the highways and byways connecting this province, and its myriad communities, you can take one route there and a different route back. Pure serenity, wherever direction you follow, there's a continuing array of quaint bed and breakfasts, elegant country inns, and all kinds of friends and events along the way. Fall. It promises to be very colourful.

ONTARIO
More to discover

To discover more about Ontario in fall, its expected and unexpected delights, call **1-800-ONTARIO** for your free travel planning kit which gives you information on events, attractions, touring routes and accommodation packages. Or visit www.travelinx.com

OR, to find out more about Ontario's Niagara region, call one of the travel associations below.

Destination Ontario Travel Association
1 800 661-6804

Festival Country
1 800 267-3399

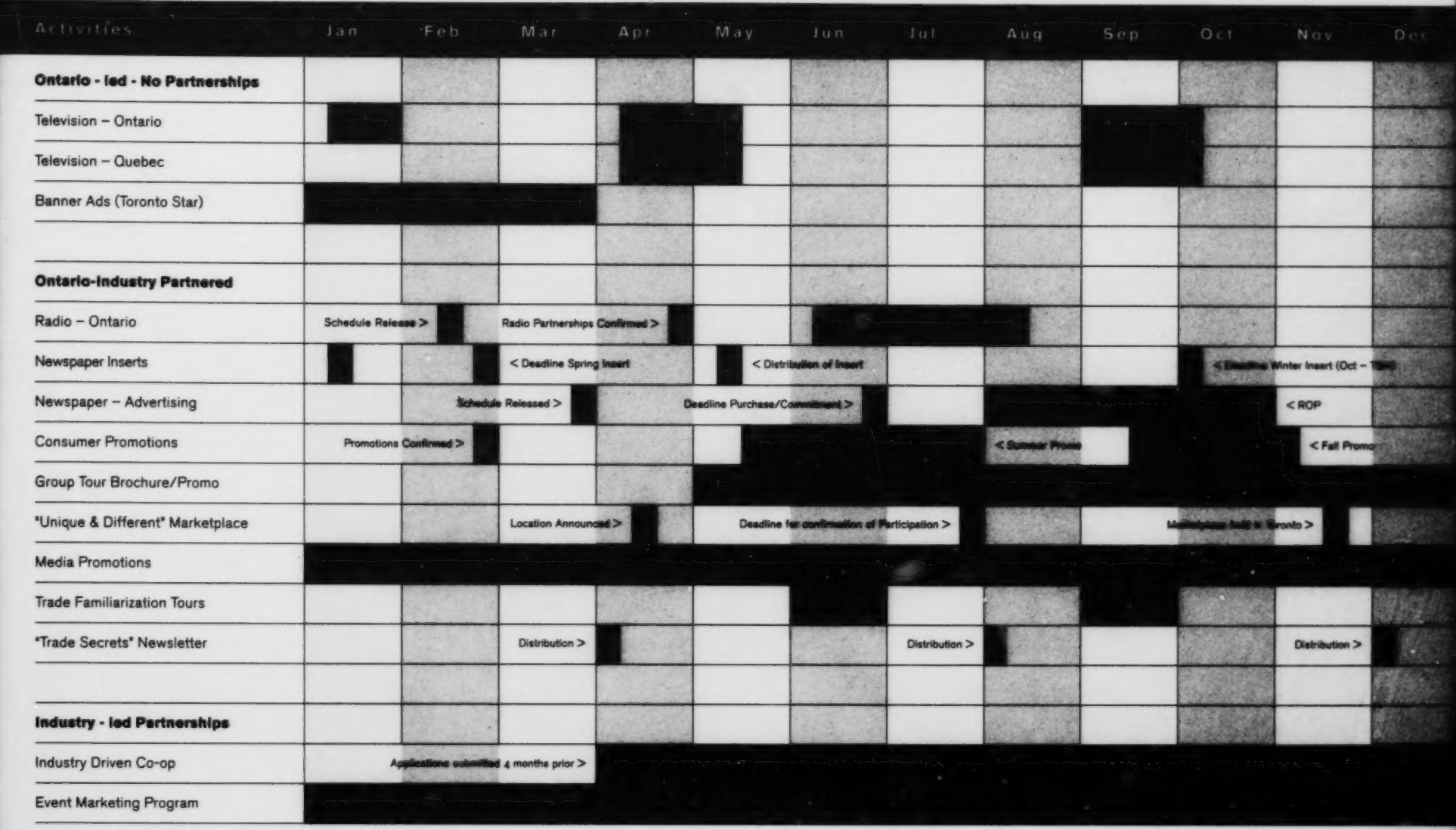
Media Promotions: News Releases, press tours, Syndicated Broadcasts and Broadcasts from Barrie Travel Information Centre	Other Trade & Promotional Initiatives
January-December 1999: Focus on outdoor recreational product, touring, events & festivals, and new, unique and different products – all of which emphasize "More to Discover;" Messaging will be determined according to product architecture	*Trade familiarization tours:* **June & September 1999:** Focus on outdoor recreational product, events & festivals, and Fall Harvest *'Trade Secrets' newsletter:* **April, August & December 1999:** Focus on new, unique and different Ontario product
Year-round, province-wide, and across Canada; Story ideas supplied to key journalists/media and news distribution services; Memberships with SATW and TMAC will be maintained to ensure access to key travel ideas, i.e., an avenue to pitch new tourism story ideas	*Familiarization tours:* Province-wide, involving tour operators and selected travel agents *'Trade Secrets' newsletter.* Distributed to travel trade and industry 3 times/year, province-wide and internationally
Increased consumer awareness of Ontario tourism product; Third party endorsement for tourism products; Increase in story ideas published; Increased unpaid media coverage	*Familiarization tours:* Intimate knowledge of Ontario's tourism products; Increase in new tour programs
Partners can synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs; Story ideas also supplied for broadcast through Barrie Travel Information Centre; Partners will have access to province's Media Contact Database	*Familiarization tours:* Partners host tours and cover related costs *'Trade Secrets' newsletter:* Key communication vehicle providing up-to-date industry news and product knowledge
Typically in-kind services, and cash on "as-needed" basis, negotiated on a per project basis	*Trade familiarization tours:* Typically in-kind services, and cash on an as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours *'Trade Secrets' newsletter:*Editorial is published free of charge; Story ideas must be received at least 2 months prior to publication; Low-cost enhanced advertorial listing (restricted space) available for approximately $250
Emphasis on shoulder and winter seasons; Partners can indicate availability of in-kind services and willingness to host tours/events	*Trade familiarization tours:* Negotiated on per project basis
Tom Boyd: 416-314-7554 E-mail: tom.boyd@edt.gov.on.ca Jack Lynch: (705) 725-7280 E-mail: jack.lynch@edt.gov.on.ca	Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

Trade Promotions & Advertising: Group Tour Brochure/Promotion	Trade Promotions: "Unique & Different" Marketplace
May-December 1999: Highlight diversity of Ontario product, with focus on soft outdoor recreational products, theatre, touring/heritage events & festivals, and fall harvest – all emphasizing "More to Discover" theme; Goal is to promote and sell group tour packages	**November 1999:** One-day, with consideration for 2 days; Marketplace geared towards domestic & nearby US tour operators & media; Highlights new, upgraded, unique and different tourism product; Structure would be free-flow
Province-wide; Target: Adults 50-75, HHI $40K+; To be distributed through travel trade and to consumers through 1-800-ONTARIO and Travel Information Centres; Consideration also for insert in "Seniors" Magazine, CAA's "Leisureways" magazine, and related publications	To be determined; Likely to be in Toronto to encourage greater US participation
Decision making/purchases (first-time & repeat) facilitated – consumers have information to plan group trip; Increased consumer & trade awareness of product; Increased awareness of consumer-friendly packaging of product through travel trade; Increase in sale of group tour packages	Greater awareness of Ontario's tourism products; Introduction of new & updated Ontario product; Promotional opportunity for the North American market; Increase in new tour programs
Development & distribution of group tour brochure; Linked to consumer promotion; Partners: OMCA & tour operators; Advertising/fulfilment opportunities for/by industry	Partners will be able to book booth space (availability dependent on facility); Marketplace partners could also provide facility, sponsor meals/breaks; familiarization tours, directory and general marketplace operation; Proposals for hosting marketplace will be considered; OMCA will partner for third time
To be negotiated; Likely to be based on level of participation, advertising and fulfilment/ distribution; Full Program to be announced by February 28, 1999	Based on length of Marketplace; Cost for booth space and directory listing would be between $250 – $500; Partners will be responsible for their own travel expenses; All other sponsorship costs to be negotiated
To be confirmed upon announcement; Financial commitment likely to be required by March 31, 1999	Location of marketplace & criteria for participation will be announced by mid-April 1999; Pending availability, deadline for confirmation of participation will be July 31, 1999
John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca	Paulette Clarke: 416-314-7572 E-mail: paulette.clarke @edt.gov.on.ca Brenda McIntosh 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca

Media Promotions: News Releases, press tours, Syndicated Broadcasts and Broadcasts from Barrie Travel Information Centre	Other Trade & Promotional Initiatives
January-December 1999: Focus on outdoor recreational product, touring, events & festivals, and new, unique and different products – all of which emphasize "More to Discover;" Messaging will be determined according to product architecture	*Trade familiarization tours:* **June & September 1999:** Focus on outdoor recreational product, events & festivals, and Fall Harvest *'Trade Secrets' newsletter:* **April, August & December 1999:** Focus on new, unique and different Ontario product
Year-round, province-wide, and across Canada; Story ideas supplied to key journalists/media and news distribution services; Memberships with SATW and TMAC will be maintained to ensure access to key travel ideas, i.e., an avenue to pitch new tourism story ideas	***Familiarization tours:*** Province-wide, involving tour operators and selected travel agents ***'Trade Secrets' newsletter:*** Distributed to travel trade and industry 3 times/year, province-wide and internationally
Increased consumer awareness of Ontario tourism product; Third party endorsement for tourism products; Increase in story ideas published; Increased unpaid media coverage	***Familiarization tours:*** Intimate knowledge of Ontario's tourism products; Increase in new tour programs
Partners can synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs; Story ideas also supplied for broadcast through Barrie Travel Information Centre; Partners will have access to province's Media Contact Database	***Familiarization tours:*** Partners host tours and cover related costs ***'Trade Secrets' newsletter:*** Key communication vehicle providing up-to-date industry news and product knowledge
Typically in-kind services, and cash on "as-needed" basis, negotiated on a per project basis	***Trade familiarization tours:*** Typically in-kind services, and cash on an as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours ***'Trade Secrets' newsletter:***Editorial is published free of charge; Story ideas must be received at least 2 months prior to publication; Low-cost enhanced advertorial listing (restricted space) available for approximately $250
Emphasis on shoulder and winter seasons; Partners can indicate availability of in-kind services and willingness to host tours/events	***Trade familiarization tours:*** Negotiated on per project basis
Tom Boyd: 416-314-7554 E-mail: tom.boyd@edt.gov.on.ca Jack Lynch: (705) 725-7280 E-mail: jack.lynch@edt.gov.on.ca	Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

Trade Promotions & Advertising: Group Tour Brochure/Promotion	Trade Promotions: "Unique & Different" Marketplace
May-December 1999: Highlight diversity of Ontario product, with focus on soft outdoor recreational products, theatre, touring/heritage events & festivals, and fall harvest – all emphasizing "More to Discover" theme; Goal is to promote and sell group tour packages	**November 1999:** One-day, with consideration for 2 days; Marketplace geared towards domestic & nearby US tour operators & media; Highlights new, upgraded, unique and different tourism product; Structure would be free-flow
Province-wide; Target: Adults 50-75, HHI $40K+; To be distributed through travel trade and to consumers through 1-800-ONTARIO and Travel Information Centres; Consideration also for insert in "Seniors" Magazine, CAA's "Leisureways" magazine, and related publications	To be determined; Likely to be in Toronto to encourage greater US participation
Decision making/purchases (first-time & repeat) facilitated – consumers have information to plan group trip; Increased consumer & trade awareness of product; Increased awareness of consumer-friendly packaging of product through travel trade; Increase in sale of group tour packages	Greater awareness of Ontario's tourism products; Introduction of new & updated Ontario product; Promotional opportunity for the North American market; Increase in new tour programs
Development & distribution of group tour brochure; Linked to consumer promotion; Partners: OMCA & tour operators; Advertising/fulfilment opportunities for/by industry	Partners will be able to book booth space (availability dependent on facility); Marketplace partners could also provide facility, sponsor meals/breaks; familiarization tours, directory and general marketplace operation; Proposals for hosting marketplace will be considered; OMCA will partner for third time
To be negotiated; Likely to be based on level of participation, advertising and fulfilment/ distribution; Full Program to be announced by February 28, 1999	Based on length of Marketplace; Cost for booth space and directory listing would be between $250 – $500; Partners will be responsible for their own travel expenses; All other sponsorship costs to be negotiated
To be confirmed upon announcement; Financial commitment likely to be required by March 31, 1999	Location of marketplace & criteria for participation will be announced by mid-April 1999; Pending availability, deadline for confirmation of participation will be July 31, 1999
John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca	Paulette Clarke: 416-314-7572 E-mail: paulette.clarke @edt.gov.on.ca Brenda McIntosh 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca

domestic markets 1999 – blocking chart marketing activities by month



B

and the americas

In 1997, the volume of overnight leisure travellers increased by 3% over 1996. Person-nights increased 4.9%, and expenditures were up by 2.8%. The main US sources of overnight leisure traffic were (in order of volume) Michigan, New York, Ohio and Pennsylvania. In 1998, overnight US border crossings into Ontario increased over 11% compared to the first nine months of 1997, largely due to the favourable exchange rate.

Sustained growth in leisure travel from the US to Ontario is projected to continue well into 2000. In 1999, Ontario will continue to benefit from the low exchange rate. The US economy is expected to grow, US consumer confidence remains high, and disposable income in US target markets is increasing. As a result, the US market will continue to provide Ontario's greatest growth opportunities.

united states and the americas

B

Customer Profile

TARGET AUDIENCE, MARKET SEGMENTS

Primary target audience: Short- to medium-haul markets: Adults 35-64, minimum high school education, with household income of $50K+. The emphasis is on travellers who've never visited Ontario. Baby boomers – 35-54, and the wealthiest and the best-educated generation ever – will continue to be avid travellers as they age. They have an affinity for nature and authenticity, and they seek out new experiences, enrichment and all-inclusive packages.

Long-haul markets: Adults, 35-64, minimum college education, with household income of $60K+, with focus on travellers who have never visited Ontario.

Secondary target audience: Adults 25-34 who have never visited Ontario

Ontario Tourism's US target audiences are consistent with those identified in the CTC's 1999-2000 US Leisure Communications Program. CTC research identifies the following as those consumers most likely to visit Canada:

- Mature segment: 55+ with household income of $US50K+
- Working middle-aged: 45-54 with household income of $US70K+
- Younger boomers: 35-44 with household income of $US70K+

ontario's greatest image weaknesses

How do Americans perceive Ontario? The following shows the greatest weaknesses of Ontario' image as a vacation destination:

- Not affordable to get get there
- Not affordable to eat there
- Accommodation is perceived expensive
- Not great for golfers
- Too far away
- Not easy to get there
- Lacks professional sports
- Bad weather in fall
- Lacks good camping
- Inadequate RV facilities

None of these attributes are a priority in terms of generating travel intent, however, affordability is crucial in terms of closing the sale, and is a likely barrier for Ontario.

ontario tourism u.s. image research, 1998

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

product profile **United States** Short to Medium Haul: Border states, urban centres (Maximum 10 hour drive or fly time of 1-hour+) Long Haul: Major urban centres/Direct flights to Ontario centres

	Winter (November – March)	Spring (April – June)
	Short/Medium/Long Haul ***Activities and Experiences*** Shopping (pre- and post-Christmas), Romance, Rest and rejuvenation, Dining, Education and enrichment ***Attractions*** Theatre & performing arts, Professional sports, Indoor and outdoor attractions ***Events and Festivals*** Consumer shows, Winter carnivals, Other indoor & outdoor activities	**Short/Medium/Long Haul** ***Activities and Experiences*** Shopping ***Indoor Attractions*** Theatre & performing arts, Festivals (e.g., Floral) **Long Haul** Festivals (e.g., Floral), Theatre & performing arts, Shopping ***Indoor Attractions***
	Short/Medium Haul ***Festivals*** Winter carnivals, Lights festivals, Maple syrup festivals, Wine Route/Small Towns, Snow Train (Sault Ste. Marie) **Long Haul** Touring product to be determined	**Short/Medium Haul** ***Southwest*** Wine region, Regional theatre (e.g., Shaw, Stratford), Festivals (e.g., Niagara Blossom festival), Maple syrup festivals, Unique communities (e.g., Mennonite culture) ***East*** Antiques/Heritage, Boatlines, Maple syrup festivals, Resorts, Country Inns (Central, Southwest, East) **Long Haul** Wine region, Regional theatre (Shaw, Stratford), Small towns, unique communities (eg., Mennonite culture), Festivals (e.g., Niagara Blossom festival), Maple syrup festivals, Resorts, Country Inns
	Short/Medium Haul Resorts, country inns provide anchor product, enhanced and complemented by diverse outdoor products – snowboarding, cross-country skiing, recreational snowmobiling, dogsledding, tubing, sleighrides, snowshoeing, apres ski Niche markets: Ice fishing, 'Snowmobile Paradise' **Long Haul** Outdoor product to be determined	**Short/Medium Haul** ***North*** Sportfishing, Wildlife viewing ***Southwest/East*** Cycling, hiking (restricted), Birding (eg., migration, trumpeter swans), Spring blossom walks, Provincial parks, Golf **Long Haul (Soft outdoor)** Sportfishing, Wildlife viewing, Birdwatching, Hiking/walking, Cycling, Canoeing, Boating, Resorts, Country Inns, Provincial/National parks

F

*Note: Product architecture to evolve based on industry's input.

Summer (July - August)

Short/Medium Haul
Package/thematic attractions (e.g., Wolf Howl, Ale Trail), Overnight cruises (e.g., Georgian Bay), Short cruises (1,000 Islands, 30,000 Islands), Heritage (Changing of the Guard, Fort Henry Sunset ceremonies), Toronto, Rideau Canal/Ottawa, Small towns, unique communities, Antiques, Summer festivals
Outdoor (soft adventure)
Walking/hiking/cycling, Birdwatching, Conservation areas, Provincial/National parks, Resorts, lodges, Country Inns
Traditional:
City stays: Toronto, Niagara Falls, Ottawa, Sightseeing, Nature/Outdoor

Long Haul
Rail (Agawa Canyon, Port Stanley, St. Jacob's, Tottenham), Overnight cruises (e.g., Georgian Bay), Short cruises (eg., 1,000 Islands, 30,000 Islands, Rideau Canal), Small towns, unique communities, Antiques, Summer festivals
Outdoor (soft adventure)
Walking/hiking/cycling, Birdwatching, Conservation areas, Wine touring
Adventure
Canoeing, Diving , Shipwrecks, African American heritage, Caribana, Heritage (eg., Upper Canada Village, Old Fort William, Fort Henry) Provincial/National parks, Golf, resorts, lodges, country inns
Traditional
City stays – Toronto, Niagara Falls, Ottawa, Sightseeing, Nature/Outdoor

Fall (September - October)

Short/Medium/Long Haul
Events, festivals (e.g., Toronto Film Festival, Oktoberfest, Niagara Grape and Wine Festival)
Attractions
Theatre, Professional sports, Shopping

Short/Medium Haul
Fall colours, Harvest festivals & fall fairs, Farmers' markets, Antiques/heritage , Shopping , Studio tours , Small towns, unique communities (e.g., Mennonite culture), Wine regions, Regional theatre (eg., Shaw, Stratford), Rail (e.g., St. Jacob's, Port Stanley, Tottenham), Cruising

Long Haul
Fall colours, Small towns, unique communities (eg., Mennonite culture), Wine region, Regional theatre (e.g., Shaw, Stratford), Rail (e.g., Agawa Canyon), Cruising

Short/Medium Haul
Cycling/hiking/walking tours, Canoeing/kayaking , Wildlife viewing, Birding (e.g., migration), Fishing and hunting, Camping, Golf, Provincial parks, Resorts, Country Inns

Long Haul
Soft adventure
Cycling/hiking/walking, Wildlife viewing, Camping, Golf, Provincial parks, Resorts, Country Inns

product profile **United States** Short to Medium Haul: Border states, urban centres (Maximum 10 hour drive or fly time of 1-hour+) Long Haul: Major urban centres/Direct flights to Ontario centres

	Winter (November - March)	Spring (April - June)
City	**Short/Medium/Long Haul** *Activities and Experiences* Shopping (pre- and post-Christmas), Romance, Rest and rejuvenation, Dining, Education and enrichment *Attractions* Theatre & performing arts, Professional sports, Indoor and outdoor attractions *Events and Festivals* Consumer shows, Winter carnivals, Other indoor & outdoor activities	**Short/Medium/Long Haul** *Activities and Experiences* Shopping *Indoor Attractions* Theatre & performing arts, Festivals (e.g., Floral) **Long Haul** Festivals (e.g., Floral), Theatre & performing arts, Shopping *Indoor Attractions*
	Short/Medium Haul *Festivals* Winter carnivals, Lights festivals, Maple syrup festivals, Wine Route/Small Towns, Snow Train (Sault Ste. Marie) **Long Haul** Touring product to be determined	**Short/Medium Haul** *Southwest* Wine region, Regional theatre (e.g., Shaw, Stratford), Festivals (e.g., Niagara Blossom festival), Maple syrup festivals, Unique communities (e.g., Mennonite culture) *East* Antiques/Heritage, Boatlines, Maple syrup festivals, Resorts, Country Inns (Central, Southwest, East) **Long Haul** Wine region, Regional theatre (Shaw, Stratford), Small towns, unique communities (eg., Mennonite culture), Festivals (e.g., Niagara Blossom festival), Maple syrup festivals, Resorts, Country Inns
Outdoor	**Short/Medium Haul** Resorts, country inns provide anchor product, enhanced and complemented by diverse outdoor products – snowboarding, cross-country skiing, recreational snowmobiling, dogsledding, tubing, sleighrides, snowshoeing, apres ski Niche markets: Ice fishing, 'Snowmobile Paradise' **Long Haul** Outdoor product to be determined	**Short/Medium Haul** *North* Sportfishing, Wildlife viewing *Southwest/East* Cycling, hiking (restricted), Birding (eg., migration, trumpeter swans), Spring blossom walks, Provincial parks, Golf **Long Haul (Soft outdoor)** Sportfishing, Wildlife viewing, Birdwatching, Hiking/walking, Cycling, Canoeing, Boating, Resorts, Country Inns, Provincial/National parks

F

*Note: Product architecture to evolve based on industry's input.

Summer (July - August)

Short/Medium Haul
Package/thematic attractions (e.g., Wolf Howl, Ale Trail), Overnight cruises (e.g., Georgian Bay), Short cruises (1,000 Islands, 30,000 Islands), Heritage (Changing of the Guard, Fort Henry Sunset ceremonies), Toronto, Rideau Canal/Ottawa, Small towns, unique communities, Antiques, Summer festivals
Outdoor (soft adventure)
Walking/hiking/cycling, Birdwatching, Conservation areas, Provincial/National parks, Resorts, lodges, Country Inns
Traditional:
City stays: Toronto, Niagara Falls, Ottawa, Sightseeing, Nature/Outdoor

Long Haul
Rail (Agawa Canyon, Port Stanley, St. Jacob's, Tottenham), Overnight cruises (e.g., Georgian Bay), Short cruises (eg., 1,000 Islands, 30,000 Islands, Rideau Canal), Small towns, unique communities, Antiques, Summer festivals
Outdoor (soft adventure)
Walking/hiking/cycling, Birdwatching, Conservation areas, Wine touring
Adventure
Canoeing, Diving , Shipwrecks, African American heritage, Caribana, Heritage (eg., Upper Canada Village, Old Fort William, Fort Henry) Provincial/National parks, Golf, resorts, lodges, country inns
Traditional
City stays – Toronto, Niagara Falls, Ottawa, Sightseeing, Nature/Outdoor

Fall (September - October)

Short/Medium/Long Haul
Events, festivals (e.g., Toronto Film Festival, Oktoberfest, Niagara Grape and Wine Festival)
Attractions
Theatre, Professional sports, Shopping

Short/Medium Haul
Fall colours, Harvest festivals & fall fairs, Farmers' markets, Antiques/heritage , Shopping , Studio tours , Small towns, unique communities (e.g., Mennonite culture), Wine regions, Regional theatre (eg., Shaw, Stratford), Rail (e.g., St. Jacob's, Port Stanley, Tottenham), Cruising

Long Haul
Fall colours, Small towns, unique communities (eg., Mennonite culture), Wine region, Regional theatre (e.g., Shaw, Stratford), Rail (e.g., Agawa Canyon), Cruising

Short/Medium Haul
Cycling/hiking/walking tours, Canoeing/kayaking , Wildlife viewing, Birding (e.g., migration), Fishing and hunting, Camping, Golf, Provincial parks, Resorts, Country Inns

Long Haul
Soft adventure
Cycling/hiking/walking, Wildlife viewing, Camping, Golf, Provincial parks, Resorts, Country Inns

why ontario?

The following lists Ontario's top ten image strengths, as compared with key US and Canadian competitors:

- Different cultures/way of life
- Good for couples
- Interesting customs/traditions
- Good for an adult vacation
- Exciting casinos
- Unique scenery
- Beautiful gardens, parks
- Excellent fishing
- Interesting cities
- Safe in tourist areas

Of these ten attributes, only 'Good for couples' and 'Good for an adult vacation' are among the top ten 'hot buttons' for generating travel demand

ontario tourism u.s. image research, 1998

Marketing Focus

Goals

- Position Ontario as a premier, four season destination
- Establish strategic long-term partnerships to increase and enhance Ontario's presence
- Develop tactical partnership opportunities for Ontario operators, destinations and regions

Objectives

- Grow overnight pleasure traffic to Ontario from the US by 3%
- Increase partnership investment in co-op programs
- Source new, non-traditional partners
- Increase calls to 1-800-ONTARIO in response to paid consumer advertising
- Increase development and sales of Ontario packages and programs through the US travel trade
- Increase the amount and value of unpaid media coverage in the US (print, broadcast, on-line)

Strategy

Ontario Tourism will employ a distinct marketing strategy for both its long-haul markets and medium-/short-haul markets, respectively. The appropriate product lines and media and promotional vehicles will be selected for each of these markets, as shown in the accompanying charts.

Strengthen Ontario's Image

- Increase consumers' consideration of Ontario as a must-see travel destination
- Convert increased travel consideration into more overnight trips

Strengthen Ontario's Presence Among Tour Operators and AAA

- Through the travel trade, focus on the development of new Ontario products offered to the independent and group traveller
- Increase sales of existing Ontario packages offered through the travel trade

Deliver an Integrated Campaign

- Provide common creative positioning across all marketing tactics
- Synchronize advertising, trade relations, and public relations functions
- Build synergy through coordination of paid advertising campaign, travel trade relations and media relations

Provide Comprehensive Fulfilment

- Provide consumers with a variety of broad-based and niche publications aimed at enhancing and lengthening their visits

Highlight Ontario's Unique and Diverse Products

- City: Shopping, dining, theatre, multicultural experience
- Touring: Cultural and heritage touring, rural theater, shopping/antiquing
- Outdoor/Nature: Angling, snowmobiling, soft adventure, resorts/golf

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

partnership opportunities advertising/media plan

	Television
[illegible]	**Spring 1999:** Highlights Ontario's diverse & unique product with the added benefits of value and accessibility **Fall 1999:** To be determined
[illegible]	Primary media buy will be US cable, which provides the ability to target households based on demographic requirements. Emphasis on mid- & long- haul markets
[illegible]	Increased consumer awareness; Increased propensity for US citizens in target markets to consider travel to Ontario
[illegible]	Campaign is for image & awareness only; Opportunity for tourism businesses to synchronize advertising activities with television campaign; Partners (e.g., major transportation, accommodation, tour operators) will be considered for long-haul markets; Details on media plan expected by February, 1999
[illegible]	To be determined
[illegible]	To be determined
[illegible]	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca J

US Industry Driven Co-op Initiatives

April 1999 – March 2000: Focuses on outdoor recreational product, touring and new, unique & different, with preference for shoulder & winter season; Must be new: new market, medium, product, partnerships

As identified in proposals

Consumer awareness of Ontario's product strengths; Increased purchases of Ontario Tourism product

Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); Details on program will be available by February 28, 1999; Initiative should be fully integrated to raise and fulfil interest, and can include advertising, (trade, consumer or media) or any combination; Approval of proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis; Consideration will be given to CTC programs in which the Province has not participated.

Suggested minimum funding for individual initiatives: $25,000; Matching contributions will be available from the Province, i.e., Industry will pay a minimum of $12,500 per initiative

Applications must be received at least 4 months prior to commencement of the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners

Mara Pezzutto: 416-325-6444
E-mail: mara.pezzutto@edt.gov.on.ca

K

partnership opportunities advertising/media plan

	Television
Timing/Product message	**Spring 1999:** Highlights Ontario's diverse & unique product with the added benefits of value and accessibility **Fall 1999:** To be determined
	Primary media buy will be US cable, which provides the ability to target households based on demographic requirements. Emphasis on mid- & long- haul markets
Expected results	Increased consumer awareness; Increased propensity for US citizens in target markets to consider travel to Ontario
	Campaign is for image & awareness only; Opportunity for tourism businesses to synchronize advertising activities with television campaign; Partners (e.g., major transportation, accommodation, tour operators) will be considered for long-haul markets; Details on media plan expected by February, 1999
Estimated cost	To be determined
	To be determined
Contact	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

partnership opportunities industry initiatives/travel trade, media

	US Industry Driven Co-op Initiatives
Timing/Product message	**April 1999 – March 2000:** Focuses on outdoor recreational product, touring and new, unique & different, with preference for shoulder & winter season; Must be new: new market, medium, product, partnerships
	As identified in proposals
Expected results	Consumer awareness of Ontario's product strengths; Increased purchases of Ontario Tourism product
	Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); Details on program will be available by February 28, 1999; Initiative should be fully integrated to raise and fulfil interest, and can include advertising, (trade, consumer or media) or any combination; Approval of proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis; Consideration will be given to CTC programs in which the Province has not participated.
Estimated cost	Suggested minimum funding for individual initiatives: $25,000; Matching contributions will be available from the Province, i.e., Industry will pay a minimum of $12,500 per initiative
	Applications must be received at least 4 months prior to commencement of the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners
Contact	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

K

US/Long Haul Test Market	US Advertising - Avid Angling, Snowmobiling & Outdoor Adventure
Early Spring 1999: Key messaging will focus on persuading consumers to consider an Ontario vacation; Highlights high yield product such as exclusive resorts, unique experiences and product themes (city, touring and outdoor, as identified in product architecture) and high value and exchange rate; Concentration on US major urban/long-haul markets; A fly/drive component will be incorporated; CTC programs concentrate on major US urban long-haul markets; Ontario Tourism participates in CTC programs on a strategic basis	**March-Sept 1999:** Three-phase campaign targets each of three specialty markets to establish Ontario's position as the premier North America destination for outdoor adventure and angling enthusiasts; Highlights high yield product such as exclusive resorts, unique adventure experiences and outdoor product, as well as high value and exchange rate; High value & accessibility would be emphasized; **March-April, November 1999:** CTC Adventure program and Snowmobile program respectively
Test markets to be determined (California is under consideration); Intention is to test the viability of a long-haul market for consumer interest/consideration, as well as to determine partner interest and participation, e.g., air & ground transportation companies, hotel chains & North American tour operators	Campaigns in mid-west states targeted at outdoor adventure consumers, avid anglers and snowmobilers; Media would include vertical publications/specialty magazines, with special editions specifically targeted; Emphasis is on those partners with ability to deliver to close proximity markets; Outdoor and Adventure magazines include: "Outside," "Backpacker;" "Canoe & Kayak;" In the snowmobiling market, direct mail and magazine advertising will also be utilized; Avid angling programs include TV and magazine advertising; CTC Adventure program includes magazine advertising (7 key publications); Snowmobile program: direct mail and magazine
Increased consumer awareness; Awareness converted to short & long term decisions/purchases; Increased enquires & bookings for partners; Decision making/purchases facilitated	Decision making/purchases facilitated – consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign, with either CTC or Ontario Tourism leading the initiative: Partner selects media coverage, timing, creative, and tag-on sales pitch for promotional spots; Ontario Tourism provides creative, media selection/purchase; Fulfilment: joint province & partner (possibly CTC): toll-free telephone, Internet, partner brochures & packages; Partner develops/maintains consumer contact; Ontario suppliers have opportunity to work with tour operators to get their product into fulfilment brochures	Partner-driven via participation in fulfilment pieces, which would include a new adventure guide, "Ontario's Snow Country" snowmobile publication, and, under consideration, a fishing packages brochure; Partner opportunities include advertorial, display advertising & direct-to-consumer packages; Partners may fulfil consumer requests directly or in partnership with province via 1-800-ONTARIO/website; Information on participation in CTC's adventure & snowmobile programs available on request
Opportunities exist for major partners such as air & ground transportation companies, hotel chains & North American tour operators; Ontario suppliers have opportunity to work with tour operators, on commissioned basis, to get their product into fulfilment brochures	Display advertising in fulfilment piece ranges from $500 to $5,000; Cost for advertorial & direct-to-consumer initiatives would be negotiated as requested and based on availability; CTC Adventure Program: $495-34,000
Initiative would be confirmed by January 1999; Schedule & costs would be released	Opportunities are on a "First Come, First Served" basis; Upon release of details, industry will negotiate/purchase preferred promotional package
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

Newspaper	Newspaper Inserts (Domestic & US border cities)
January 1999 – June 1999: Key messaging will focus on reasons to travel sooner rather than later (e.g., exchange rate and value); Concentration on regional itineraries and product themes (city, touring and outdoor); Fly/drive component will be incorporated in selected markets; Ads to appear in the Sunday travel section; **April-May, Aug-Sep 1999:** CTC inserts in urban markets, highlighting cities, touring & resorts; Other newspaper opportunities to be determined	**May 1999:** Minimum 48 Pages; All-encompassing, multi-experience advertorial; summer & fall **January 2000:** 32 pages (Sales close Aug. 1999); Town & Country, Winter Outdoors, City, Festivals & Events (on a limited basis)
Newspaper ads focus on major dailies in selected short- and mid- haul markets, and potentially, may run year-round to include promotion of shoulder seasons; CTC undertakes activities in San Francisco, Dallas, Boston, New York, Minneapolis	Select dailies across province; Consideration for distribution in Montreal, Quebec, and US border cities
Increased consumer awareness; Increased calls to 1-800-ONTARIO; Decision making/purchases facilitated; Consumers encouraged to extend day trips to overnight, and to extend overnight trips to additional nights	Decision making/purchases facilitated – Consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign: Partner selects timing, media coverage, creative, and specific promotional spot; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website; CTC partnerships promote Ontario within "Canada" context	Partner-driven campaign: Partner has opportunity to promote product(s) throughout Ontario (and potentially Quebec/US border cities); Partner has creative input, placement in insert and direct fulfilment support; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website
Cost will vary by market and frequency (1998/99: for SINGLE Newspaper insertion, price range was US$500 – $2700); To improve impact, recommended minimum of 3 insertions per market; CTC cost identified in "1999/2000 US Leisure Communications Plan"	Varies by size of ad & commitment; Spring Insert: Variety of options, from short listings to full page, select; CPM efficiencies for additional Quebec & US border cities; Options, schedule & cost will be available by December 31, 1998, for spring insert
New program guidelines will be released February 1999; Expression of interest, confirmation & financial commitment would be required 2 months prior to confirmed insertion date	Spring 1999 (Ontario/Quebec/US border: Expression of interest by Feb 15, 1999, with confirmation by Feb 28, 1999; Financial commitment must be received by March 15, 1999; Winter 2000: Timelines to be confirmed by Jan 31, 1999
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca Carol Maxwell: 416-314-7568 E-mail: carol.maxwell@edt.gov.on.ca

US/Long Haul Test Market	US Advertising - Avid Angling, Snowmobiling & Outdoor Adventure
Early Spring 1999: Key messaging will focus on persuading consumers to consider an Ontario vacation; Highlights high yield product such as exclusive resorts, unique experiences and product themes (city, touring and outdoor, as identified in product architecture) and high value and exchange rate; Concentration on US major urban/long-haul markets; A fly/drive component will be incorporated; CTC programs concentrate on major US urban long-haul markets; Ontario Tourism participates in CTC programs on a strategic basis	**March-Sept 1999:** Three-phase campaign targets each of three specialty markets to establish Ontario's position as the premier North America destination for outdoor adventure and angling enthusiasts; Highlights high yield product such as exclusive resorts, unique adventure experiences and outdoor product, as well as high value and exchange rate; High value & accessibility would be emphasized; **March-April, November 1999:** CTC Adventure program and Snowmobile program respectively
Test markets to be determined (California is under consideration); Intention is to test the viability of a long-haul market for consumer interest/consideration, as well as to determine partner interest and participation, e.g., air & ground transportation companies, hotel chains & North American tour operators	Campaigns in mid-west states targeted at outdoor adventure consumers, avid anglers and snowmobilers; Media would include vertical publications/specialty magazines, with special editions specifically targeted; Emphasis is on those partners with ability to deliver to close proximity markets; Outdoor and Adventure magazines include: "Outside," "Backpacker," "Canoe & Kayak;" In the snowmobiling market, direct mail and magazine advertising will also be utilized; Avid angling programs include TV and magazine advertising; CTC Adventure program includes magazine advertising (7 key publications); Snowmobile program: direct mail and magazine
Increased consumer awareness; Awareness converted to short & long term decisions/purchases; Increased enquires & bookings for partners; Decision making/purchases facilitated	Decision making/purchases facilitated – consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign, with either CTC or Ontario Tourism leading the initiative: Partner selects media coverage, timing, creative, and tag-on sales pitch for promotional spots; Ontario Tourism provides creative, media selection/purchase; Fulfilment: joint province & partner (possibly CTC): toll-free telephone, Internet, partner brochures & packages; Partner develops/maintains consumer contact; Ontario suppliers have opportunity to work with tour operators to get their product into fulfilment brochures	Partner-driven via participation in fulfilment pieces, which would include a new adventure guide, "Ontario's Snow Country" snowmobile publication, and, under consideration, a fishing packages brochure; Partner opportunities include advertorial, display advertising & direct-to-consumer packages; Partners may fulfil consumer requests directly or in partnership with province via 1-800-ONTARIO/website; Information on participation in CTC's adventure & snowmobile programs available on request
Opportunities exist for major partners such as air & ground transportation companies, hotel chains & North American tour operators; Ontario suppliers have opportunity to work with tour operators, on commissioned basis, to get their product into fulfilment brochures	Display advertising in fulfilment piece ranges from $500 to $5,000; Cost for advertorial & direct-to-consumer initiatives would be negotiated as requested and based on availability; CTC Adventure Program: $495-34,000
Initiative would be confirmed by January 1999; Schedule & costs would be released	Opportunities are on a "First Come, First Served" basis; Upon release of details, industry will negotiate/purchase preferred promotional package
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

January 1999 – June 1999: Key messaging will focus on reasons to travel sooner rather than later (e.g., exchange rate and value); Concentration on regional itineraries and product themes (city, touring and outdoor); Fly/drive component will be incorporated in selected markets; Ads to appear in the Sunday travel section; **April-May, Aug-Sep 1999:** CTC inserts in urban markets, highlighting cities, touring & resorts; Other newspaper opportunities to be determined	**May 1999:** Minimum 48 Pages; All-encompassing, multi-experience advertorial; summer & fall **January 2000:** 32 pages (Sales close Aug. 1999); Town & Country, Winter Outdoors, City, Festivals & Events (on a limited basis)
Newspaper ads focus on major dailies in selected short- and mid- haul markets, and potentially, may run year-round to include promotion of shoulder seasons; CTC undertakes activities in San Francisco, Dallas, Boston, New York, Minneapolis	Select dailies across province; Consideration for distribution in Montreal, Quebec, and US border cities
Increased consumer awareness; Increased calls to 1-800-ONTARIO; Decision making/purchases facilitated; Consumers encouraged to extend day trips to overnight, and to extend overnight trips to additional nights	Decision making/purchases facilitated – Consumers have information in-hand; Increased consumer awareness of seasonal products; Repeat purchases encouraged
Partner-driven campaign: Partner selects timing, media coverage, creative, and specific promotional spot; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website; CTC partnerships promote Ontario within "Canada" context	Partner-driven campaign: Partner has opportunity to promote product(s) throughout Ontario (and potentially Quebec/US border cities); Partner has creative input, placement in insert and direct fulfilment support; Ontario Tourism provides "umbrella" – creative, media selection/purchase, and fulfilment support through 1-800-ONTARIO and website
Cost will vary by market and frequency (1998/99: for SINGLE Newspaper insertion, price range was US$500 – $2700); To improve impact, recommended minimum of 3 insertions per market; CTC cost identified in "1999/2000 US Leisure Communications Plan"	Varies by size of ad & commitment; Spring Insert: Variety of options, from short listings to full page, select; CPM efficiencies for additional Quebec & US border cities; Options, schedule & cost will be available by December 31, 1998, for spring insert
New program guidelines will be released February 1999; Expression of interest, confirmation & financial commitment would be required 2 months prior to confirmed insertion date	Spring 1999 (Ontario/Quebec/US border: Expression of interest by Feb 15, 1999, with confirmation by Feb 28, 1999; Financial commitment must be received by March 15, 1999; Winter 2000: Timelines to be confirmed by Jan 31, 1999
Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca Carol Maxwell: 416-314-7568 E-mail: carol.maxwell@edt.gov.on.ca

Industry-driven Co-op: AAA Initiative	Media Promotions: News Releases, press tours syndicated broadcasts
Spring 1999 & Ongoing: Highlights Ontario touring product.; Program to encompass consumer advertising in AAA publications, consumer/member promotions, travel trade activities with AAA offices, and media relations	**January-December 1999:** Focuses on outdoor recreational product, touring, events & festivals, and new, unique and different products – all of which emphasize "More to Discover;" Messaging will be determined according to product architecture; Vacation value and exchange rate will be emphasized in all activities
AAA offices and publications in the border and short-haul markets, with a view to expanding the program further into the US in future; Program would complement Ontario's core advertising program	All US , with emphasis on medium- and long-haul markets; Major dailies and high-end, niche-market and lifestyle publications; Story ideas supplied to key journalists/media and news distribution services; Memberships will be maintained with SATW and TMAC to ensure access for pitching new tourism story ideas
Increased awareness and choice of Ontario as a destination for AAA members in selected US markets	Increased consumer awareness of Ontario tourism product; Third party endorsement for tourism products; Increase in story ideas picked-up/published; Increased unpaid media coverage
Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); AAA publications & member promotions fulfilment via 1-800-ONTARIO/website and direct consumer contact through partner advertising; Fulfilment via CTC Ontario Touring book directly through AAA, whose editorial is controlled by Ontario & its partners; Consideration will be given for the distribution of additional publications after a one-year review of program	Synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs, and also supply story ideas for broadcast through syndicated broadcast; Partners will have access to province's US media contact database
Partners can negotiate presence in AAA promotional material and submit proposal to Ontario Tourism for consideration; Rate card for 2000 edition of touring book will be available by August 1999; For information on participation in fulfilment through Provincial-led publications, refer to "Cross-Market Programs"	Typically in-kind services, and cash on as-needed basis, negotiated on per project basis
Program details will be available by January 1999	Emphasis on four seasons; Partners can indicate availability of in-kind services and willingness to host tours/events
Sandra Chabot: 519-652-1391 Fax 519-652-0533 E-mail: swota@lonet.ca	Tom Boyd: 416-314-7554 E-mail: tom.boyd@edt.gov.on.ca

Industry-driven Co-op: AAA Initiative	Media Promotions: News Releases, press tours syndicated broadcasts
Spring 1999 & Ongoing: Highlights Ontario touring product.; Program to encompass consumer advertising in AAA publications, consumer/member promotions, travel trade activities with AAA offices, and media relations	**January-December 1999:** Focuses on outdoor recreational product, touring, events & festivals, and new, unique and different products – all of which emphasize "More to Discover;" Messaging will be determined according to product architecture; Vacation value and exchange rate will be emphasized in all activities
AAA offices and publications in the border and short-haul markets, with a view to expanding the program further into the US in future; Program would complement Ontario's core advertising program	All US , with emphasis on medium- and long-haul markets; Major dailies and high-end, niche-market and lifestyle publications; Story ideas supplied to key journalists/media and news distribution services; Memberships will be maintained with SATW and TMAC to ensure access for pitching new tourism story ideas
Increased awareness and choice of Ontario as a destination for AAA members in selected US markets	Increased consumer awareness of Ontario tourism product; Third party endorsement for tourism products; Increase in story ideas picked-up/published; Increased unpaid media coverage
Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); AAA publications & member promotions fulfilment via 1-800-ONTARIO/website and direct consumer contact through partner advertising; Fulfilment via CTC Ontario Touring book directly through AAA, whose editorial is controlled by Ontario & its partners; Consideration will be given for the distribution of additional publications after a one-year review of program	Synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs, and also supply story ideas for broadcast through syndicated broadcast; Partners will have access to province's US media contact database
Partners can negotiate presence in AAA promotional material and submit proposal to Ontario Tourism for consideration; Rate card for 2000 edition of touring book will be available by August 1999; For information on participation in fulfilment through Provincial-led publications, refer to "Cross-Market Programs"	Typically in-kind services, and cash on as-needed basis, negotiated on per project basis
Program details will be available by January 1999	Emphasis on four seasons; Partners can indicate availability of in-kind services and willingness to host tours/events
Sandra Chabot: 519-652-1391 Fax 519-652-0533 E-mail: swota@lonet.ca	Tom Boyd: 416-314-7554 E-mail: tom.boyd@edt.gov.on.ca

Other CTC Partnership Opportunities	Mexico & Brazil Promotional Activities (CTC-led)
The following CTC programs are available for partnership opportunities: **Display advertising:** 'Canada Travel Guide' (national fulfilment publication) US Mature Program Winter/Ski Program Trade Program Advertising Cities/Resorts Program Outdoor Adventure Program Snowmobiling Program Meetings & Incentives Program	**January 1999 - March 2000/ On-going year-round:** Follows the lead of the CTC on a strategic basis; Highlights world class Ontario product, as identified in European product architecture; Goal is to familiarize travel trade with Province's tourism offerings, to facilitate the inclusion of Ontario product in their promotions/sales of individual & group tour packages
	Advertising/ Fulfilment/Sales Missions & Educational Seminars: To be led by the CTC; Familiarization tours are delivered province-wide, and in partnership with airlines, wholesalers/tour operators & receptives
	Improved knowledge of Ontario's product offerings; Increased Ontario product in Latin American & Emerging markets' tour operator brochures; Purchase of Ontario tourism product facilitated
	Advertising/Fulfilment: CTC initiatives only; Open to industry-led initiatives; **Sales missions/Educational Seminars:** CTC initiatives only; Open to industry-led initiatives; **Familiarization tours:** Through requests or by targeting specific travel trade, the opportunity is to develop product and host travel parties; Preference will be given to Shoulder & Winter months & new product
	Sales missions/Educational Seminars: Activities require a cash contribution (to cover organization & operating costs), and are usually approximately $2,000-3,000; Partners are responsible for their own travel costs; **Familiarization Tours:** Typically in-kind services, and cash on as-needed basis - negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
	A schedule of CTC Sales missions and educational seminars will be available by January 31, 1999; Partnership & financial commitment must be received 2 months prior to start of initiative
If interested in participation in the above programs, contact Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Kelly Johnston: 416-314-1709 E-mail: kelly.johnston@edt.gov.on.ca

Trade Promotions - Marketplaces, Educational seminars, Promotional & Familiarization tours	Touring Program (CTC Program)
January – December 1999, Ongoing/Year-round: Highlight diversity of Ontario product, as identified in product architecture, to US travel trade (Tour operators, wholesalers, transportation companies); Goal is to familiarize US travel trade with Province's tourism offerings to facilitate the inclusion of Ontario Product in their promotions/sales of individual & group tour packages	**Ongoing, year-round:** Highlights Ontario touring product in 'The Canadian Explorer'; via Ontario edition, one of five regional guides in the series **March-August 99:** Advertises Ontario touring product in AAA magazines, highlighting 'The Canadian Explorer' touring guides as fulfilment; Vacation value and exchange rate will be emphasized in all publications
Sales Missions & Educational Seminars will be held in key source/emerging markets; Familiarization tours are delivered Province-wide (general promotion, and as identified by travel trade requests)	Advertising in 13 AAA magazines: 15 million circulation over 24 weeks of advertising; Guides available at AAA offices in short- and medium-haul markets, plus additional distribution in long-haul markets via AAA offices
Improved knowledge of Ontario's product offerings; Increased Ontario product in US tour operator brochures; Purchase of Ontario tourism product facilitated	Increased consumer awareness of Ontario's product strengths; Increased visitation to Ontario by AAA members
Sales missions/Educational Seminars: Partnership-delivery: To complement other promotional activities, Province would target travel trade in these markets. Industry may also identify markets/business that they would be interested in approaching; this should be undertaken under "Industry-Driven Initiatives," where consideration would be given to marketing consortia (with all partners identified); **Familiarization tours:** Through either request or targeting specific travel trade, opportunity is to develop tour and host travel parties; Preference will be given to Shoulder & Winter months and new product	Partners can place display advertising in touring guide
Sales missions/Educational Seminars: US-based activities typically require a cash contribution (to cover organization & operating costs) and are usually in the range of $US500-$2,000; Partners are responsible for their own travel costs; Familiarization Tours: Typically in-kind services, and cash on an as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours	Identified in CTC's 1999/2000 US Leisure Communications Program; Display ads range from $US11,000 - 18,500
A schedule of sales missions/educational seminars will be available by January 31, 1999; Partnership and financial commitment must be received 2 months prior to start of the initiative	Early December 98; Deadline for next edition: October 1999
Kelly Johnston: 416-314-1709 E-mail: kelly.johnston@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

S

Other CTC Partnership Opportunities	Mexico & Brazil Promotional Activities (CTC-led)
The following CTC programs are available for partnership opportunities: **Display advertising:** 'Canada Travel Guide' (national fulfilment publication) US Mature Program Winter/Ski Program Trade Program Advertising Cities/Resorts Program Outdoor Adventure Program Snowmobiling Program Meetings & Incentives Program	**January 1999 - March 2000/ On-going year-round:** Follows the lead of the CTC on a strategic basis; Highlights world class Ontario product, as identified in European product architecture; Goal is to familiarize travel trade with Province's tourism offerings, to facilitate the inclusion of Ontario product in their promotions/sales of individual & group tour packages
	Advertising/ Fulfilment/Sales Missions & Educational Seminars: To be led by the CTC; Familiarization tours are delivered province-wide, and in partnership with airlines, wholesalers/tour operators & receptives
	Improved knowledge of Ontario's product offerings; Increased Ontario product in Latin American & Emerging markets' tour operator brochures; Purchase of Ontario tourism product facilitated
	Advertising/Fulfilment: CTC initiatives only; Open to industry-led initiatives; **Sales missions/Educational Seminars:** CTC initiatives only; Open to industry-led initiatives; **Familiarization tours:** Through requests or by targeting specific travel trade, the opportunity is to develop product and host travel parties; Preference will be given to Shoulder & Winter months & new product
	Sales missions/Educational Seminars: Activities require a cash contribution (to cover organization & operating costs), and are usually approximately $2,000-3,000; Partners are responsible for their own travel costs; **Familiarization Tours:** Typically in-kind services, and cash on as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
	A schedule of CTC Sales missions and educational seminars will be available by January 31, 1999; Partnership & financial commitment must be received 2 months prior to start of initiative
If interested in participation in the above programs, contact Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca	Kelly Johnston: 416-314-1709 E-mail: kelly.johnston@edt.gov.on.ca

Trade Promotions – Marketplaces, Educational seminars, Promotional & Familiarization tours	Touring Program (CTC Program)
January – December 1999, Ongoing/Year-round: Highlight diversity of Ontario product, as identified in product architecture, to US travel trade (Tour operators, wholesalers, transportation companies); Goal is to familiarize US travel trade with Province's tourism offerings to facilitate the inclusion of Ontario Product in their promotions/sales of individual & group tour packages	**Ongoing, year-round:** Highlights Ontario touring product in 'The Canadian Explorer'; via Ontario edition, one of five regional guides in the series **March-August 99:** Advertises Ontario touring product in AAA magazines, highlighting 'The Canadian Explorer' touring guides as fulfilment; Vacation value and exchange rate will be emphasized in all publications
Sales Missions & Educational Seminars will be held in key source/emerging markets; Familiarization tours are delivered Province-wide (general promotion, and as identified by travel trade requests)	Advertising in 13 AAA magazines: 15 million circulation over 24 weeks of advertising; Guides available at AAA offices in short- and medium-haul markets, plus additional distribution in long-haul markets via AAA offices
Improved knowledge of Ontario's product offerings; Increased Ontario product in US tour operator brochures; Purchase of Ontario tourism product facilitated	Increased consumer awareness of Ontario's product strengths; Increased visitation to Ontario by AAA members
Sales missions/Educational Seminars: Partnership-delivery: To complement other promotional activities, Province would target travel trade in these markets. Industry may also identify markets/business that they would be interested in approaching; this should be undertaken under "Industry-Driven Initiatives," where consideration would be given to marketing consortia (with all partners identified); **Familiarization tours:** Through either request or targeting specific travel trade, opportunity is to develop tour and host travel parties; Preference will be given to Shoulder & Winter months and new product	Partners can place display advertising in touring guide
Sales missions/Educational Seminars: US-based activities typically require a cash contribution (to cover organization & operating costs) and are usually in the range of $US500-$2,000; Partners are responsible for their own travel costs; Familiarization Tours: Typically in-kind services, and cash on an as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours	Identified in CTC's 1999/2000 US Leisure Communications Program; Display ads range from $US11,000 - 18,500
A schedule of sales missions/educational seminars will be available by January 31, 1999; Partnership and financial commitment must be received 2 months prior to start of the initiative	Early December 98; Deadline for next edition: October 1999
Kelly Johnston: 416-314-1709 E-mail: kelly.johnston@edt.gov.on.ca	Mara Pezzutto: 416-325-6444 E-mail: mara.pezzutto@edt.gov.on.ca

S

1999 program schedule **US Trade Shows and Marketplaces**

	Date/ Location	Opportunity	Partner cost	Contact
Ohio Travel Association Heartland Travel Showcase	Feb 11-14/ Cleveland OH	Marketplace with up to 45 scheduled buyer-seller appointments; Approx. 225 tour operators from Illinois, Indiana, Michigan, New York, Pennsylvania, Ohio, Tennessee, Wisconsin, Kentucky, West Virginia	Registration: $US 695-820	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
CTC Spotlight Canada	Mar 2/Chicago; Mar 4/Minneapolis, 2 shows; Mar 8-9/Detroit & Cleveland	Show for tour operators, travel agents and AAA	$US 500 per show; Minneapolis (2 shows): $US 1,000	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
Ontario Tourism Mid-Atlantic Workshops & Marketplaces	Mar 23-25 New Jersey, Eastern New York, Eastern Pennsylvania, Washington DC area (total 6 venues)	Show for retail travel trade, including tour operators and leisure travel agents	To be determined; Budget minimum $US 600 registration for all venues	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
CTC Travel Trade Shows	Apr 26-29/ Texas (including Houston, San Antonio, Austin, Dallas)	Show for retail travel trade, including tour operators and leisure travel agents	Registration: $US 2,600 for all shows, plus travel costs	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
Media Events	Dec 10/98/ Chicago: 'Ontario Ragtime' Event; Feb 6/Phoenix: 'Spirits in the Sun' Media Event; Mar 14-16/ New York: Dateline Canada Media Marketplace (CTC); Spring/Location to be determined: TMAC Media Event; Air Canada Media Events: Mar 25/ Chicago; Apr 15/San Francisco; Apr 22/Boston; Nov/Denver	Some of these events have limited partnership opportunities; Tourism operators can suggest story ideas and submit material to increase unpaid media coverage and exposure; Operators can indicate availability of in-kind services and willingness to host tours/events		Tom Boyd, 416-314-7554/ E-mail: tom.boyd@edt.gov.on.ca
Ontario Tourism Sales Mission to California	Late May-early June/ Los Angeles and area, San Francisco and area	Partner with Air Canada to target tour operators, travel agents and AAA	To be determined	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
National Tour Association Marketplace	Late May-early June/ Los Angeles and area, San Francisco and area	Opportunity to meet with approx. 600 tour operators; Potential for over 50 scheduled appointments	NTA members only; approx. $US 1,000	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
American Bus Association Marketplace	Dec 5-10/ Birmingham AL	Opportunity to meet with approx. 500 tour operators; Potential for over 50 scheduled appointments	approx. $US 1,000	

1999 program schedule **Latin America Trade Shows and Marketplaces**

	Conozca Canada Tour Operator Seminars & Travel Agent Trade Shows	Braztoa/Cobrat Brazil Tour Operator Trade Show & Rio Workshop	ABAV Trade Show
Date	Apr 26-29, 1999	Apr 5-9, 1999	Oct 21-23, 1999
Location	Mexico City, Guadalajara, Monterrey	Sao Paulo, Rio de Janeiro, Brazil	Curitiba, Brazil
Target Audience	Travel trade	Travel trade	Travel trade
Description	A CTC Canada-only event held in three of Mexico's largest cities; Educational seminars for Mexican tour operators and travel agents; Good opportunity for DMOs, hotels and attractions	Annual trade show with 80 of Brazil's top tour operators and 2500 travel agents; Braztoa tour operators represent 70% of Brazil's outbound travel business; Opportunity to promote destination and travel products to qualified Brazilian travel trade; Rio workshop held for 500 travel agents and tour operators to promote Canada (Ontario) destinations and products	National trade show attracting 4500 travel agents from across Brazil; Opportunity for provinces and DMOs to raise awareness of Canada and Ontario destinations and travel products
Partner cost	Registration: $Cdn 2,500 plus travel costs	Brazioa: $Cdn 3,000 plus travel costs; Rio workshop: $Cdn 500 plus travel costs	$Cdn 2,500 plus travel costs; Coordinated by CTC
Contact	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca

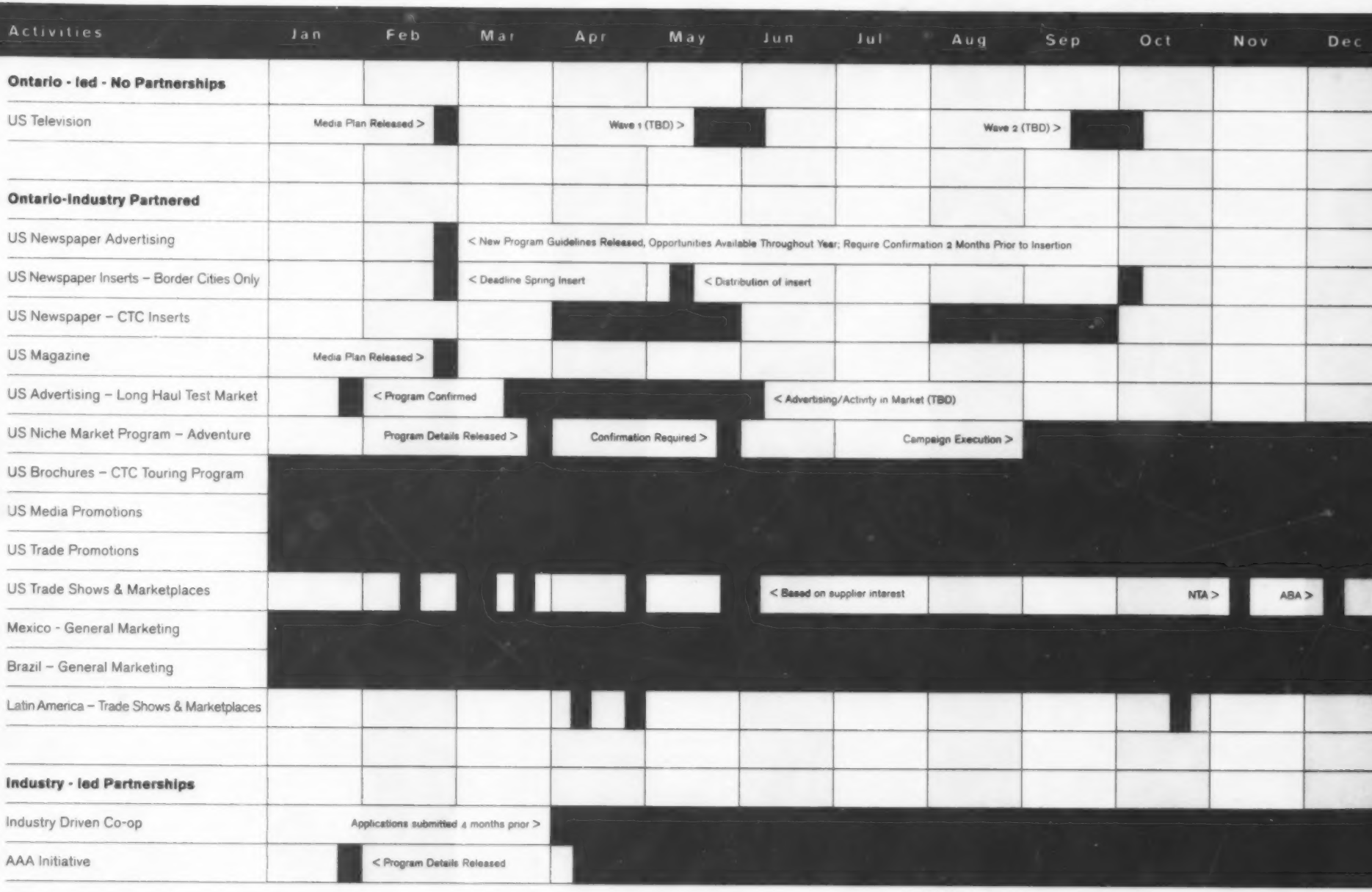
1999 program schedule **US Trade Shows and Marketplaces**

	Date/ Location	Opportunity	Partner cost	Contact
Ohio Travel Association Heartland Travel Showcase	Feb 11-14/ Cleveland OH	Marketplace with up to 45 scheduled buyer-seller appointments: Approx. 225 tour operators from Illinois, Indiana, Michigan, New York, Pennsylvania, Ohio, Tennessee, Wisconsin, Kentucky, West Virginia	Registration: $US 695-820	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
CTC Spotlight Canada	Mar 2/Chicago; Mar 4/Minneapolis, 2 shows; Mar 8-9/Detroit & Cleveland	Show for tour operators, travel agents and AAA	$US 500 per show; Minneapolis (2 shows): $US 1,000	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
Ontario Tourism Mid-Atlantic Workshops & Marketplaces	Mar 23-25 New Jersey, Eastern New York, Eastern Pennsylvania, Washington DC area (total 6 venues)	Show for retail travel trade, including tour operators and leisure travel agents	To be determined; Budget minimum $US 600 registration for all venues	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
CTC Travel Trade Shows	Apr 26-29/ Texas (including Houston, San Antonio, Austin, Dallas)	Show for retail travel trade, including tour operators and leisure travel agents	Registration: $US 2,600 for all shows, plus travel costs	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
Media Events	Dec 10/98/ Chicago: 'Ontario Ragtime' Event; Feb 6/Phoenix: 'Spirits in the Sun' Media Event; Mar 14-16/ New York: Dateline Canada Media Marketplace (CTC); Spring/Location to be determined: TMAC Media Event; Air Canada Media Events: Mar 25/ Chicago; Apr 15/San Francisco; Apr 22/Boston; Nov/Denver	Some of these events have limited partnership opportunities; Tourism operators can suggest story ideas and submit material to increase unpaid media coverage and exposure; Operators can indicate availability of in-kind services and willingness to host tours/events		Tom Boyd, 416-314-7554/ E-mail: tom.boyd@edt.gov.on.ca
Ontario Tourism Sales Mission to California	Late May-early June/ Los Angeles and area, San Francisco and area	Partner with Air Canada to target tour operators, travel agents and AAA	To be determined	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
National Tour Association Marketplace	Late May-early June/ Los Angeles and area, San Francisco and area	Opportunity to meet with approx. 600 tour operators; Potential for over 50 scheduled appointments	NTA members only; approx. $US 1,000	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca
American Bus Association Marketplace	Dec 5-10/ Birmingham AL	Opportunity to meet with approx. 500 tour operators; Potential for over 50 scheduled appointments	approx. $US 1,000	

1999 program schedule **Latin America Trade Shows and Marketplaces**

	Conozca Canada Tour Operator Seminars & Travel Agent Trade Shows	Braztoa/Cobrat Brazil Tour Operator Trade Show & Rio Workshop	ABAV Trade Show
Date	Apr 26-29, 1999	Apr 5-9, 1999	Oct 21-23, 1999
Location	Mexico City, Guadalajara, Monterrey	Sao Paulo, Rio de Janeiro, Brazil	Curitiba, Brazil
Target Audience	Travel trade	Travel trade	Travel trade
Description	A CTC Canada-only event held in three of Mexico's largest cities; Educational seminars for Mexican tour operators and travel agents; Good opportunity for DMOs, hotels and attractions	Annual trade show with 80 of Brazil's top tour operators and 2500 travel agents; Braztoa tour operators represent 70% of Brazil's outbound travel business; Opportunity to promote destination and travel products to qualified Brazilian travel trade; Rio workshop held for 500 travel agents and tour operators to promote Canada (Ontario) destinations and products	National trade show attracting 4500 travel agents from across Brazil; Opportunity for provinces and DMOs to raise awareness of Canada and Ontario destinations and travel products
Partner cost	Registration: $Cdn 2,500 plus travel costs	Braztoa: $Cdn 3,000 plus travel costs; Rio workshop: $Cdn 500 plus travel costs	$Cdn 2,500 plus travel costs; Coordinated by CTC
Contact	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca	Kelly Johnston 416-314-1709/ E-mail: kelly.johnston@edt.gov.on.ca

u.s. & american markets 1999 – blocking chart marketing activities by month



C

europe

With the exception of the United Kingdom, all European economies were in decline in 1997. Most economies are going through structural adjustment in preparation for monetary unification, i.e., the 'Euro.' In 1998, Ontario receipts from the UK have held steady, while other markets continued to decline, showing slight signs of recovery towards year-end. Overall, receipts from Europe were down in volume and stays were shorter, but the spend per night was higher.

Recovery in European economies is expected by 2000, subject to any ripple effects from the Russian financial crisis This could be particularly evident in Germany. Pleasure travel from the UK to Ontario is expected to remain strong. Within three years, it is expected that travel from all other European markets will return to the high visitation rate of 1996. Beyond the current conditions, it's expected that the 'Euro Zone' will be a major force in world tourism, outperforming the US in arrivals, receipts and outbound trips.

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

europe

Customer Profile

Target Audience

Primary: United Kingdom, Germany, France
Secondary: Netherlands, Italy, Switzerland, Austria

Market Segments

United Kingdom
Prime-of-lifers: Adults 35-54, singles and couples, with household income of £35K; high spenders, purchasers of independent/tailor-made products, fly-drive
Upwardly mobile: Adults 25-34, single and married, no children; primarily purchasers of packages, with some interest in coach/car product
Empty-nesters/retirees: 55+, attracted to independent/tailor-made, car and up-market coach product
CTC segments:
'Nature Lovers:' Affluent, well-educated, prefer independent travel; opt for vacations that include outstanding scenery, wildlife, national parks, forests, lakes, rivers, and small towns
'Culture Vultures:' Similar interests as Nature Lovers, but also interested in museums, art galleries, historic sites and other cultural attractions
'Adventurers:' Singles and relatively affluent couples with no children; eager to participate in a variety of sports events and activities, e.g., golf, skiing, water sports, trekking

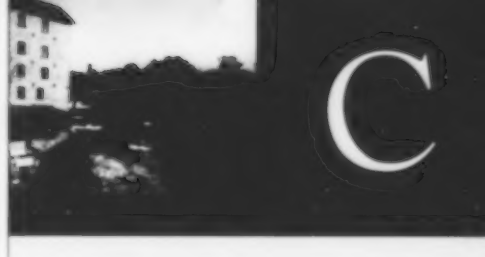
demographic trends in the united kingdom

	1987	2005
Population	*58.6 million*	*59.1 million*
20-34	21.6%	18.8%
35-49	20.8%	22.3%
50-64	16.2%	18.0%

Approximately 40% of the UK's present population is 50 years of age or older. This growing segment has more time, money and interest in looking for unique travel experiences. There is also growth in the 35-49 year old segment – those with children who are leaving or will leave home, who have paid off their debts, and are in the major savings life-phase. These segments present opportunities for we fly/drive experiences, soft adventure (e.g., hiking and birding), and sophisticated product (e.g., resorts, fine dining).

u.s. census bureau, ontario consumer tracking and world tourism organization, 1998

europe



Customer Profile

Target Audience

Primary: United Kingdom, Germany, France
Secondary: Netherlands, Italy, Switzerland, Austria

Market Segments

United Kingdom

Prime-of-lifers: Adults 35-54, singles and couples, with household income of £35K; high spenders, purchasers of independent/tailor-made products, fly-drive

Upwardly mobile: Adults 25-34, single and married, no children; primarily purchasers of packages, with some interest in coach/car product

Empty-nesters/retirees: 55+, attracted to independent/tailor-made, car and up-market coach product

CTC segments:

'Nature Lovers:' Affluent, well-educated, prefer independent travel; opt for vacations that include outstanding scenery, wildlife, national parks, forests, lakes, rivers, and small towns

'Culture Vultures:' Similar interests as Nature Lovers, but also interested in museums, art galleries, historic sites and other cultural attractions

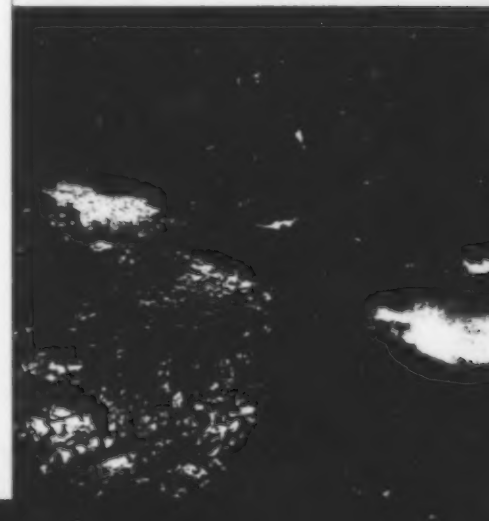
'Adventurers:' Singles and relatively affluent couples with no children; eager to participate in a variety of sports events and activities, e.g., golf, skiing, water sports, trekking

demographic trends in the united kingdom

	1997	2005
Population	*58.6 million*	*59.1 million*
20-34	21.6%	18.8%
35-49	20.8%	22.3%
50-64	16.2%	18.0%

Approximately 40% of the UK's present population is 50 years of age or older. This growing segment has more time, money and interest in looking for unique travel experiences. There is also growth in the 35–49 year old segment – those with children who are leaving or will leave home, who have paid off their debts, and are in the major savings life-phase. These segments present opportunities for new fly/drive experiences, soft adventure (e.g., hiking and birding), and sophisticated products (e.g., resorts, fine dining).

u.s. census bureau, ontario consumer tracking and world tourism organization, 1998



demographic trends in germany

	1997	2005
Population	*84.1 million*	*87.8 million*
20-34	22.4%	18.1%
35-49	22.1%	25.2%
50-64	18.7%	18.1%

Germany's population is 'maturing to middle-age.' Within the next decade, a greater proportion of population will be within Ontario's typical market. This is a wealthy and discerning population segment, and presents opportunities for budget-oriented fly/drive itineraries, active outdoors (e.g., hiking, canoeing) and scenic small towns/wine route touring.

u.s. census bureau, ontario consumer tracking and world tourism organization, 1998

effects of the 'euro,' europe's new single currency system

For outbound tourism, a strong Euro will encourage holidays to non-European destinations, while a weak Euro will encourage trips within the Euro zone. On the other hand, a strong Euro could discourage inbound tourists, who would be more likely to choose cheaper destinations.

world tourism organization, 1998

Germany (Primarily Fly/Drive & FIT [Fully Independent Travellers])
Empty-nesters/Seniors: 55+, will also consider up-market coach product
Families: 25-54, female skew, value-oriented
Other segments: Youthful explorers: 18-25, backpackers, adventure-oriented
CTC segments:
'Economizers:' Young & middle-aged, seeking economical ways to travel, often eager to experience motor home or RV holiday
'Nature Lovers:' Middle-aged, with income relatively higher than other travellers; seeking outdoor experiences (e.g., natural areas, coastal attractions, wildlife)
'Culture and Festival Enthusiasts:' Middle-aged, interested in regions offering cultural and local festivals, arts, e.g., city touring, Aboriginal experiences
'Sports Enthusiasts:' Early- to late-30s, adventurous, looking for thrills, excitement, sports events (e.g., skiing, golf, hiking, water sports)
'New Seniors:' A secondary segment with highest market share increases; Active, with comfortable income level

France (CTC segments)
All ages: Nature
Adults 15-45: Outdoor/sports, Adventure
Adults 35+: Touring, City/resorts, History
Adults 55+: Culture, history

Netherlands (CTC segments)
Adults 25-35: Affluent, well-educated couples without children;
Adults 50-60: VFRs (Visiting Friends & Relatives), affluent early retirees;
Students: Tending towards low budget travel, potential to become future spenders

Italy (CTC segments)
Nature, Outdoor/sports, City/resorts, Culture, Touring
Adults 25-34: Affluent, well-educated professionals oriented toward active holidays with a variety of activities
Adults 35-54: Affluent, well-educated professionals, oriented toward touring, comfort

Switzerland (CTC segments)
Individual travellers: Adults 26-60, high income, Fly & Drive packages, touring
Group travellers: Average & high income; no specific expectations, limited knowledge of Canada
Backpackers: Adults 20-30, low income, Nature, Culture
Families Adults 30-60, average income, Nature, motor home trips
Prestige travellers Adults 35-60, average income, mostly couples, seeking comfort, exclusive experiences, well-organized trips

product profile *Note: Product architecture to evolve based on industry's input.

Winter/Shoulder (November - April)	Summer (Mid-May - August)	Fall (September - October)
Activities and Experiences/City breaks Shopping (pre- and post-Christmas), romance, rest and rejuvenation, dining **Attractions** Theatre & performing arts, professional sports, indoor and outdoor attractions **Events and Festivals** Consumer shows, Winterlude, Festival of Lights, other indoor & outdoor attractions, Aboriginal Festival **Special interest** Cooking schools **Combination** City experience + resort experience	City breaks: Toronto, Ottawa, Niagara Falls Shopping, dining	**Activities and Experiences** City breaks: Toronto, Ottawa, Niagara Falls Shopping, dining **Attractions** Theatre & performing arts, professional sports **Events and Festivals** Festivals (Niagara Grape & Wine) Consumer shows, Festival of Lights, other indoor & outdoor activities **Special interest** Cooking schools
Festivals Winter carnivals, Lights festivals, Maple syrup festivals **Education & enrichment** Wine tasting tours, cooking schools	Provincial/National parks, canoeing, hiking, Wolf Howl, wineries/breweries, touring by houseboat, motor home, car, **Attractions, special events** Caribana, Tulip Festival, small towns, unique communities (St. Jacobs, Niagara-on-the-Lake), rail excursions (eg., Agawa, Polar Bear Express), cruising/waterways	Fall colours, Indian Summer, small towns, unique communities, wine region, regional theatre (e.g., Shaw, Stratford), rail (e.g., St. Jacobs, Port Stanley), shopping **Events and Festivals** Harvest festivals & fall fairs, special events, small towns, unique communities (e.g., St. Jacobs, Niagara-on-the-Lake), antiques/heritage, studio tours, rail excursions (e.g., Agawa, Polar Bear Express), cruising/waterways, resorts
Resorts & soft adventure Resorts featuring winter activities – cross-country skiing, recreational snowmobiling, tubing, skating, sleighrides, snowshoeing	Resorts/golf, Soft/hard adventure experience, Canoeing, hiking, cycling, whitewater rafting, horseback riding, wildlife viewing (eg., Polar bear, birding, moose)	**Ecotourism** Butterflies, birding (migration), wildlife viewing, fishing and camping **Soft adventure** Canoeing/kayaking, golf, cycling, hiking/walking **Hard adventure** Provincial/National parks

demographic trends in germany

	1997	2005
Population	*84.1 million*	*87.8 million*
20–34	22.4%	18.2%
35–49	22.1%	25.2%
50–64	18.7%	18.1%

Germany's population is 'maturing to middle-age.' Within the next decade, a greater proportion of population will be within Ontario's typical market. This is a wealthy and discerning population segment, and presents opportunities for budget-oriented fly/drive itineraries, active outdoors (e.g., hiking, canoeing) and scenic small towns/scenic route touring.

u.s. census bureau, ontario consumer tracking and world tourism organization, 1998

effects of the 'euro,' europe's new single currency system

For outbound tourism, a strong Euro will encourage holidays to non-European destinations, while a weak Euro will encourage trips within the Euro zone. On the other hand, a strong Euro could discourage inbound tourists, who would be more likely to choose cheaper destinations.

world tourism organization, 1998

Germany (Primarily Fly/Drive & FIT [Fully Independent Travellers])
Empty-nesters/Seniors: 55+, will also consider up-market coach product
Families: 25-54, female skew, value-oriented
Other segments: Youthful explorers: 18-25, backpackers, adventure-oriented
CTC segments:
'Economizers:' Young & middle-aged, seeking economical ways to travel, often eager to experience motor home or RV holiday
'Nature Lovers:' Middle-aged, with income relatively higher than other travellers; seeking outdoor experiences (e.g., natural areas, coastal attractions, wildlife)
'Culture and Festival Enthusiasts:' Middle-aged, interested in regions offering cultural and local festivals, arts, e.g., city touring, Aboriginal experiences
'Sports Enthusiasts:' Early- to late-30s, adventurous, looking for thrills, excitement, sports events (e.g., skiing, golf, hiking, water sports)
'New Seniors:' A secondary segment with highest market share increases; Active, with comfortable income level

France (CTC segments)
All ages: Nature
Adults 15-45: Outdoor/sports, Adventure
Adults 35+: Touring, City/resorts, History
Adults 55+: Culture, history

Netherlands (CTC segments)
Adults 25-35: Affluent, well-educated couples without children;
Adults 50-60: VFRs (Visiting Friends & Relatives), affluent early retirees;
Students: Tending towards low budget travel, potential to become future spenders

Italy (CTC segments)
Nature, Outdoor/sports, City/resorts, Culture, Touring
Adults 25-34: Affluent, well-educated professionals, oriented toward active holidays with a variety of activities
Adults 35-54: Affluent, well-educated professionals, oriented toward touring, comfort

Switzerland (CTC segments)
Individual travellers: Adults 26-60, high income, Fly & Drive packages, touring
Group travellers: Average & high income; no specific expectations, limited knowledge of Canada
Backpackers: Adults 20-30, low income, Nature, Culture
Families Adults 30-60, average income, Nature, motor home trips
Prestige travellers Adults 35-60, average income, mostly couples, seeking comfort, exclusive experiences, well-organized trips

product profile

*Note: Product architecture to evolve based on industry's input.

	Winter/Shoulder (November - April)	Summer (Mid-May - August)	Fall (September - October)
City	**Activities and Experiences/City breaks** Shopping (pre- and post-Christmas), romance, rest and rejuvenation, dining **Attractions** Theatre & performing arts, professional sports, indoor and outdoor attractions **Events and Festivals** Consumer shows, Winterlude, Festival of Lights, other indoor & outdoor attractions, Aboriginal Festival **Special interest** Cooking schools **Combination** City experience + resort experience	City breaks: Toronto, Ottawa, Niagara Falls Shopping, dining	**Activities and Experiences** City breaks: Toronto, Ottawa, Niagara Falls Shopping, dining **Attractions** Theatre & performing arts, professional sports **Events and Festivals** Festivals (Niagara Grape & Wine) Consumer shows, Festival of Lights, other indoor & outdoor activities **Special interest** Cooking schools
	Festivals Winter carnivals, Lights festivals, Maple syrup festivals Country Inns, resorts **Education & enrichment** Wine tasting tours, cooking schools	Provincial/National parks, canoeing, hiking, Wolf Howl, wineries/breweries, touring by houseboat, motor home, car, **Attractions, special events** Caribana, Tulip Festival, small towns, unique communities (St. Jacobs, Niagara-on-the-Lake), rail excursions (eg., Agawa, Polar Bear Express), cruising/waterways	Fall colours, Indian Summer, small towns, unique communities, wine region, regional theatre (e.g., Shaw, Stratford), rail (e.g., St. Jacobs, Port Stanley), shopping **Events and Festivals** Harvest festivals & fall fairs, special events, small towns, unique communities (e.g., St. Jacobs, Niagara-on-the-Lake), antiques/heritage, studio tours, rail excursions (e.g., Agawa, Polar Bear Express), cruising/waterways, resorts
Outdoor	**Resorts & soft adventure** Resorts featuring winter activities – cross-country skiing, recreational snowmobiling, tubing, skating, sleighrides, snowshoeing	Resorts/golf, Soft/hard adventure experience, Canoeing, hiking, cycling, whitewater rafting, horseback riding, wildlife viewing (eg., Polar bear, birding, moose)	**Ecotourism** Butterflies, birding (migration), wildlife viewing, fishing and camping **Soft adventure** Canoeing/kayaking, golf, cycling, hiking/walking **Hard adventure** Provincial/National parks

Pan-Europe (CTC - UK & Germany) "Canadian Travel Specialists"	Pan-European - Key Markets "Ontario-Only" Consumer Publications (General)	Pan-European - Key Markets "Ontario-Only" Consumer Publications (Niche)
Year-round CTC-led initiative: Designation of travel agents & tour operators as "Canadian Travel Specialists." Introduces and educates travel trade on the diversity of Canada and its 4-season products; Designated CTS, are in direct contact with consumers, and are well-informed of, and carry, Canadian tourism product; Ontario, working with CTC, participates in educational seminars, workshops and on-site visits, and product testing tours	**"Only in Ontario" Lure:** Currently available for distribution in English, French and German; Lure only; Highlights Ontario's unique, high-quality, exciting & diverse product offerings, value options and touring itineraries, to provide consumers with travel ideas **Trade Companion to "Only in Ontario" lure:** 15-20 page brochure detailing tour operator product available for Ontario and Canadian Travel Specialists in UK (Fall 1999) & Germany (Spring 2000); Ontario editorial & self-drive itineraries also featured	**"Ontario - Adventure Map & Guide:"** Currently available for distribution in English, German and Italian; Highlights Ontario's unique, high-quality, adventure product offerings, value options, and touring itineraries to provide ideas for Adventure travellers' trips and experiences **"Shopping in Ontario" Lure:** Spring 1999 Release, English only; Prefaced by editorial on cultural diversity; provincial shopping experiences would be identified to highlight Ontario's unique products
It is expected that there will be 200-350 qualified CTSs throughout the country, in the UK and Germany respectively; Goal in UK is to establish membership for 500 second-tier members	Through in-market representatives responding to consumer inquiries; Inserts in key trade magazines e.g., "Selling Long Haul" (UK) and "FVW" (Germany); Through tour operators, travel agents who carry Ontario product	Through in-market representatives responding to consumer inquiries, travel agency displays (Adventure-only), and through tour operators/travel agents who carry Ontario product
Increased awareness among travel agent/tour operators of value, excitement and unique diversity of product; Increased number of travel agents, tour operators carrying Ontario product; Increased sales of Ontario product through CTC program	Decision making/purchases facilitated - consumers have preliminary information to plan trip; Increased consumer & trade awareness of seasonal & specific products	Decision making/purchases facilitated - consumers have preliminary information to plan trips; Increased consumer & trade awareness of seasonal & specific products
CTC is lead on program; Ontario suppliers have opportunity to work with tour operators, and through partnered initiatives, to get their product in fulfilment brochures; Partners host-on-site visits, product testing tours, and cover related costs	**"Only in Ontario" Lure & Trade Companion:** Advertising opportunities limited to European-based tour operators. However, regional partners have opportunities to assist in design of trip itineraries in Reprint;	**"Ontario - Adventure Map & Guide:"** Partners buy into Program; Advertising opportunities for Outfitters, Associations, DMOs & European-based tour operators; Also, opportunity for regional partners to assist in development of creative & fulfilment content. **"Shopping in Ontario" Lure:** No advertising; Media/Trade product testing tours to promote touring/shopping
CTC-related activities: As identified in CTC 1999-2000 European marketing plan; Hosting of on-site visits, product testing tours: typically in-kind services and cash on an as-needed basis; negotiated on a per project basis	Varies by size of ad and commitment; **"Only in Ontario" Lure & Trade Companion:** Options schedule & costs will be available by August 1999 (UK) and December 1999 (Germany)	Varies by program & commitment; **"Ontario - Adventure Map & Guide:"** Program details & cost will be available by September 1999. **"Shopping in Ontario" Lure:** In-kind services, and cash on as-needed basis - negotiated on per tour basis; Partners can indicate availability of in-kind services and willingness to host tours
Ongoing; Partners can indicate availability of in-kind services and willingness to host visits/tours	**"Only in Ontario" Lure & Trade Companion:** Details forthcoming	**"Ontario - Adventure Map & Guide, "Shopping in Ontario" Lure:** Details forthcoming
Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca A	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

partnership opportunities

	Pan-Europe Television (CTC/Partner)	Pan-Europe Advertising - CTC Brochures
Timing/Product message	**United Kingdom:** : 90-second infomercials, highlighting Ontario (15-second portion) within an Eastern Canada context; Dec 1998 – Jan 1999; **Germany:** 90-second infomercials, highlighting Ontario (20-second portion) within Eastern Canada context; Dec 1998 – March 1999 **France:** 90-second infomercials, highlighting Ontario (20 second portion) within Eastern Canada context; April 1999	Pan European Guide: Fulfilment to CTC advertising across Europe (as identified in CTC marketing plans); Published in 5 languages (English, French, German, Dutch, Italian); Highlights key Ontario product, primarily summer; Activities Guide: In-market trade companion fulfilment to Pan-European Guide; Published in English, French, German; Highlights key Ontario travel trade contacts
	Media buy will be targeted at major urban centres (key source markets: e.g. London, Munich, Paris) and delivered through direct response television	In all markets in which CTC advertises; Brochures will be distributed as fulfilment to advertising, and will also be available through CTC offices, Ontario in-market reps, and Canadian embassies and consulates
Expected results	Increased consumer awareness; Increased consumer enquires; Increased propensity for residents to travel to Ontario	Increased consumer awareness of value, excitement, unique product diversity; Decision-making/purchases facilitated – consumers have information in-hand; Repeat purchases encouraged
	CTC is lead on awareness campaign with Ontario brand positioning; Suppliers have opportunity to work with receptives/tour operators to get their product in fulfilment brochures	CTC is lead on campaign; Ontario suppliers have opportunity to work with tour operators, on commissioned basis, and through partnered initiatives, to get their product information in fulfilment brochures
Estimated cost		As identified in CTC 1999-2000 European marketing plan
		To be listed in 2000 edition, commitment required by June 1999; Schedule/participation costs should be available two months prior to deadline
Contact	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

Pan-Europe (CTC - UK & Germany) "Canadian Travel Specialists"	Pan-European - Key Markets "Ontario-Only" Consumer Publications (General)	Pan-European - Key Markets "Ontario-Only" Consumer Publications (Niche)
Year-round CTC-led initiative: Designation of travel agents & tour operators as "Canadian Travel Specialists;" Introduces and educates travel trade on the diversity of Canada and its 4-season products; Designated CTS, are in direct contact with consumers, and are well-informed of, and carry, Canadian tourism product; Ontario, working with CTC, participates in educational seminars, workshops and on-site visits, and product testing tours	**"Only in Ontario" Lure:** Currently available for distribution in English, French and German; Lure only: Highlights Ontario's unique, high-quality, exciting & diverse product offerings, value options and touring itineraries, to provide consumers with travel ideas **Trade Companion to "Only in Ontario" lure:** 16-20 page brochure detailing tour operator product available for Ontario and Canadian Travel Specialists in UK (Fall 1999) & Germany (Spring 2000); Ontario editorial & self-drive itineraries also featured	**"Ontario – Adventure Map & Guide:"** Currently available for distribution in English, German and Italian; Highlights Ontario's unique, high-quality, adventure product offerings, value options, and touring itineraries to provide ideas for Adventure travellers' trips and experiences **"Shopping in Ontario" Lure:** Spring 1999 Release, English only; Prefaced by editorial on cultural diversity; provincial shopping experiences would be identified to highlight Ontario's unique products
It is expected that there will be 200-350 qualified CTSs throughout the country, in the UK and Germany respectively; Goal in UK is to establish membership for 500 second-tier members	Through in-market representatives responding to consumer inquiries; Inserts in key trade magazines e.g., "Selling Long Haul" (UK) and "FVW" (Germany); Through tour operators, travel agents who carry Ontario product	Through in-market representatives responding to consumer inquiries, travel agency displays (Adventure-only), and through tour operators/travel agents who carry Ontario product
Increased awareness among travel agent/tour operators of value, excitement and unique diversity of product; Increased number of travel agents, tour operators carrying Ontario product; Increased sales of Ontario product through CTC program	Decision making/purchases facilitated – consumers have preliminary information to plan trip; Increased consumer & trade awareness of seasonal & specific products	Decision making/purchases facilitated – consumers have preliminary information to plan trips; Increased consumer & trade awareness of seasonal & specific products
CTC is lead on program; Ontario suppliers have opportunity to work with tour operators, and through partnered initiatives, to get their product in fulfilment brochures; Partners host-on-site visits, product testing tours, and cover related costs	**"Only in Ontario" Lure & Trade Companion:** Advertising opportunities limited to European-based tour operators. However, regional partners have opportunities to assist in design of trip itineraries in Reprint;	**"Ontario – Adventure Map & Guide:"** Partners buy into Program; Advertising opportunities for Outfitters, Associations, DMOs & European-based tour operators; Also, opportunity for regional partners to assist in development of creative & fulfilment content. **"Shopping in Ontario" Lure:** No advertising; Media/Trade product testing tours to promote touring/shopping
CTC-related activities: As identified in CTC 1999-2000 European marketing plan; Hosting of on-site visits, product testing tours: typically in-kind services and cash on an as-needed basis; negotiated on a per project basis	Varies by size of ad and commitment; **"Only in Ontario" Lure & Trade Companion:** Options schedule & costs will be available by August 1999 (UK) and December 1999 (Germany)	Varies by program & commitment; **"Ontario – Adventure Map & Guide:"** Program details & cost will be available by September 1999. **"Shopping in Ontario" Lure:** In-kind services, and cash on as-needed basis – negotiated on per tour basis; Partners can indicate availability of in-kind services and willingness to host tours
Ongoing; Partners can indicate availability of in-kind services and willingness to host visits/tours	**"Only in Ontario" Lure & Trade Companion:** Details forthcoming	**"Ontario – Adventure Map & Guide, "Shopping in Ontario" Lure:** Details forthcoming
Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca A	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

	Pan-Europe Television (CTC/Partner)	Pan-Europe Advertising – CTC Brochures
	United Kingdom: : 90-second infomercials, highlighting Ontario (15-second portion) within an Eastern Canada context; Dec 1998 – Jan 1999; **Germany:** 90-second infomercials, highlighting Ontario (20-second portion) within Eastern Canada context; Dec 1998 – March 1999 **France:** 90-second infomercials, highlighting Ontario (20 second portion) within Eastern Canada context; April 1999	Pan European Guide: Fulfilment to CTC advertising across Europe (as identified in CTC marketing plans); Published in 5 languages (English, French, German, Dutch, Italian); Highlights key Ontario product, primarily summer; Activities Guide: In-market trade companion fulfilment to Pan-European Guide; Published in English, French, German; Highlights key Ontario travel trade contacts
	Media buy will be targeted at major urban centres (key source markets: e.g. London, Munich, Paris) and delivered through direct response television	In all markets in which CTC advertises; Brochures will be distributed as fulfilment to advertising, and will also be available through CTC offices, Ontario in-market reps, and Canadian embassies and consulates
	Increased consumer awareness; Increased consumer enquires; Increased propensity for residents to travel to Ontario	Increased consumer awareness of value, excitement, unique product diversity; Decision-making/purchases facilitated – consumers have information in-hand; Repeat purchases encouraged
	CTC is lead on awareness campaign with Ontario brand positioning; Suppliers have opportunity to work with receptives/tour operators to get their product in fulfilment brochures	CTC is lead on campaign; Ontario suppliers have opportunity to work with tour operators, on commissioned basis, and through partnered initiatives, to get their product information in fulfilment brochures
		As identified in CTC 1999-2000 European marketing plan
		To be listed in 2000 edition, commitment required by June 1999; Schedule/participation costs should be available two months prior to deadline
	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

C

demographic trends in france

	1997	2005
Population	*58.5 million*	*60.1 million*
20-34	21.7%	20.0%
35-49	22.1%	21.4%
50-64	15.2%	18.2%

Although France's population is aging, Ontario's traditional market (age 25-45) will remain stable. This group typically comprises couples (without children) who are educated, middle-income earners in professional/technical occupations. This presents new FIT opportunities and growth in outdoor adventure and touring products.

u.s. census bureau, ontario consumer tracking and world tourism organization, 1998

"The Euro zone will be the number one force in world tourism, outperforming its nearest competitor, the USA, in terms of tourist arrivals, tourism receipts and outbound trips."

world tourism organization secretary-general francesco frangialli

Marketing Strategy

Goals

- Position Ontario as a premier, four season destination – popular, diverse and exciting
- Convert awareness to visitation
- Establish strategic long-term partnerships with industry stakeholders and key international travel trade

Objectives

- Strengthen the appeal of Ontario's three main product lines
- Expand programs in key markets
- Work with Ontario-based partners to expand travel trade opportunities

Strategy

Strengthen Ontario's image

- Continue to build awareness within an overall Canadian marketing context (CTC)
- Build sales in UK and Germany through independent solo campaigns
- Focus on multi-season experiences and products

Deliver an Integrated Campaign

- Ensure a common message and product focus in all elements of campaigns, with consistent messaging throughout advertising, media and travel relations, publications and packages

Increase and Generate New Unpaid Media Coverage

- Maintain and build strong relationships with consumer and travel trade media
- Synchronize media/trade relations with advertising and other marketing activities
- Continue to increase niche coverage, targeting high-end lifestyle magazines

Focus on Ontario's Three Core Product Lines

- Emphasize diversity of the trip experience
- Focus on how these different trip types change from season to season
- Highlight Ontario's unique selling propositions and niche market destinations and experiences

Increase Sales of Ontario's Packaged Products

- Increase the range and diversity of products carried by North American operators
- Educate the travel trade on product offerings – for example, through product testing tours
- Work with airlines, receptive operators, tour operators and suppliers to create high-value, competitive packages

	Europe: Industry-Driven Co-op Initiatives	France Travel Trade Initiatives Timing/Message
	April 1999 – March 2000: As driven by product architecture, focus is on hard sell outdoor recreational product, touring, and new, unique & different, with preference for shoulder & winter season; Must be new: new market, medium, product, partnerships and/or consumer promotion	**March or November 1999 (To be determined):** "Thematic Ateliers:" Undertaken in partnership with the CTC, host thematic information sessions and participate in sales missions to selected tour operators to raise French travel trade industry's awareness of excitement & diversity of Ontario's product, and its ability to fulfil French consumers' tastes; Partners would host subsequent product-testing tours
	As identified in proposals	Primarily major urban centres (e.g. Paris, Lyon); Tour operators & travel agents
	Consumer awareness of Ontario's product strengths; Increased purchase of Ontario tourism product	Increased travel trade awareness of Ontario; Increase in Ontario product available through French travel trade; Increase in consumer packages booked through the travel trade
	Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); Full details on program will be available by February 28, 1999; Initiative should be fully integrated to raise & fulfil interest, and can be advertising, trade, consumer or media, or any combination; Proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis; Consideration will be given to CTC programs in which Ontario Tourism has not participated	CTC-led Partnership activity: Attend "Thematic Ateliers" as part of Canadian Regional Sales Mission, in partnership with Ontario Tourism; Partnership provides in-kind services with the CTC, airlines, Ontario suppliers; Ontario suppliers host product testing tours and cover related costs
	To ensure reasonable impact, suggested minimum funding for individual initiatives is $50,000; Matching contributions would be available from the Province, i.e., Industry would provide a minimum of $25,000 per initiative	"Thematic Atelier:" Refer to CTC European Marketing Plan; Registration cost expected to be approximately $3,000; Partners are responsible for own travel costs; Partners host product testing tours, typically in-kind services and cash on an as-needed basis – negotiated on per project basis
	Applications must be received at least 6 months prior to start of the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners	Program to be confirmed by January 1999
	Proposals to be submitted to Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Proposals to be submitted to Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

	Europe: Industry-Driven Co-op Initiatives	France Travel Trade Initiatives Timing/Message
Timing/Product message	**April 1999 – March 2000:** As driven by product architecture, focus is on hard sell outdoor recreational product, touring, and new, unique & different, with preference for shoulder & winter season. Must be new: new market, medium, product, partnerships and/or consumer promotion.	**March or November 1999 (To be determined):** "Thematic Ateliers." Undertaken in partnership with the CTC, host thematic information sessions and participate in sales missions to selected tour operators to raise French travel trade industry's awareness of excitement & diversity of Ontario's product, and its ability to fulfil French consumers' tastes. Partners would host subsequent product-testing tours.
[illegible]	As identified in proposals	Primarily major urban centres (e.g. Paris, Lyon); Tour operators & travel agents
Expected results	Consumer awareness of Ontario's product strengths; Increased purchase of Ontario tourism product	Increased travel trade awareness of Ontario; Increase in Ontario product available through French travel trade; Increase in consumer packages booked through the travel trade
[illegible]	Industry-led initiative. Consideration will only be given to marketing consortia (with all partners identified). Full details on program will be available by February 28, 1999. Initiative should be fully integrated to raise & fulfil interest, and can be advertising, trade, consumer or media, or any combination. Proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis. Consideration will be given to CTC programs in which Ontario Tourism has not participated.	CTC-led Partnership activity. Attend "Thematic Ateliers" as part of Canadian Regional Sales Mission, in partnership with Ontario Tourism. Partnership provides in-kind services with the CTC, airlines, Ontario suppliers. Ontario suppliers host product testing tours and cover related costs.
Estimated cost	To ensure reasonable impact, suggested minimum funding for individual initiatives is $[illegible]. Matching contributions would be available from the Province, i.e. Industry would provide a minimum of $[illegible] per initiative.	"Thematic Ateliers" Refer to CTC European Marketing Plan. Registration cost expected to be approximately $[illegible]. Partners are responsible for own travel costs. Partners host product testing tours, typically in-kind services and cash on an as needed basis – negotiated on per project basis.
[illegible]	Applications must be received at least 6 months prior to start of the initiative. Funding may be reduced or rescinded based on non-performance of contract with Provincial Partners.	Program to be confirmed by January 1999.
Contact	Proposals to be submitted to Jill Ward, [illegible] E-mail: jill.ward@edt.gov.on.ca	Proposals to be submitted to Jill Ward, [illegible] E-mail: jill.ward@edt.gov.on.ca

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

UK & Germany Mailhouses

Year-Round 1999-2000: Consumer brochure distribution service through UK & German mailhouses

As determined by Ontario-related advertising activities; Partner brochures distributed to qualified consumers (i.e., inquiries resulting from advertising for information on related product.

Increased distribution of brochures Decision making/purchases facilitated – consumers have preliminary information to plan trips; Increased awareness of specific Ontario products

Opportunity for Industry Associations and DMOs: Partners can ship brochures to European mailhouses for further distribution to qualified consumers; Recommended that partners have export-ready product and are undertaking (or plan to undertake) promotion activities in UK and/or Germany.

Partners are only responsible for shipping costs (from Ontario to UK/Germany); Costs are based on weight/size/delivery time-frame of shipment

Ongoing; Two months notice required to ensure in-market representatives are properly informed of product and can promote brochure as part of fulfilment to enquires

Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

United Kingdom Solo-Advertising Campaign	Germany Solo-Advertising Campaign	UK & Germany Direct Mail
January – February 1999: Coincident with CTC advertising activities and key planning time-frame for future summer travel, the campaign highlights Ontario's excitement & unique diversity and "Reason to visit" message	**January – March 1999:** Coincident with CTC advertising activities and key planning time-frame for future summer travel, the campaign highlights excitement & unique diversity to raise "top-of-mind" awareness of Ontario as a must-see, multi-season destination; Goal is to raise awareness to encourage consumers to consider "Ontario is Canada"	**Winter/Shoulder & Late-Fall 1999-2000:** In conjunction with European tour operators/wholesalers and key partners; Direct-to-consumer campaigns to attract short-term traffic to specific products, as defined in product architecture; Value and exchange rate to be promoted where applicable
Newspaper: National press, Weekend editions; Distribution throughout UK	Print (media mix to be determined); Distribution to major German urban centres	As determined by in-market partners (and their associated consumer mailing lists), and by appropriately targeted travel agents
Increased consumer awareness & inquiries; Increased sales of Ontario product	Increased consumer awareness & inquiries; Increased distribution of Ontario & Partner tourism publications; Increased intention-to-travel to Ontario	Decision making/purchases facilitated – consumers have preliminary information to plan trips; Increased sales of seasonal & specific Ontario products
Pending performance of 1998/99 campaign, Ontario Tourism would consider similar 1999/2000 campaign; Target partners would be key UK tour operators who carry Ontario product; Suppliers have opportunity to work with tour operators, on commissioned basis, to get their product in fulfilment brochures	Pending performance of 1998/99 campaign, Ontario Tourism would consider similar 1999/2000 campaign; Target partners would be key German travel trade who carry Ontario product; Suppliers have opportunity to work with travel trade, on commissioned basis, to get their product in fulfilment brochures	As determined by in-market partners, driven by Provincial-Industry partnership; Opportunity to work with operator/wholesaler directly, or within initiatives developed under industry-driven co-op; Ontario Tourism will facilitate program delivery
Pending performance of 1998/99 campaign, program would be developed, and details would be released, by June 1999	Pending performance of 1998/99 campaign, program would be developed, and details would be released, by June 1999	As determined by specific project; Based on direct-mail volume/execution, distribution & partners
It is expected that commitment would be required by August 1999.	It is expected that commitment would be required by August 1999.	Projects typically developed by operators/wholesalers, who would advise potential partners of opportunities at least 2-3 months in advance; However, for industry-driven proposals, applications must be received at least 4 months prior to the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners.
Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

UK & Germany Mailhouses

Year-Round 1989-2000: Consumer brochure distribution service through UK & German mailhouses

As determined by Ontario-related advertising activities; Partner brochures distributed to qualified consumers (i.e., inquiries resulting from advertising for information on related product.

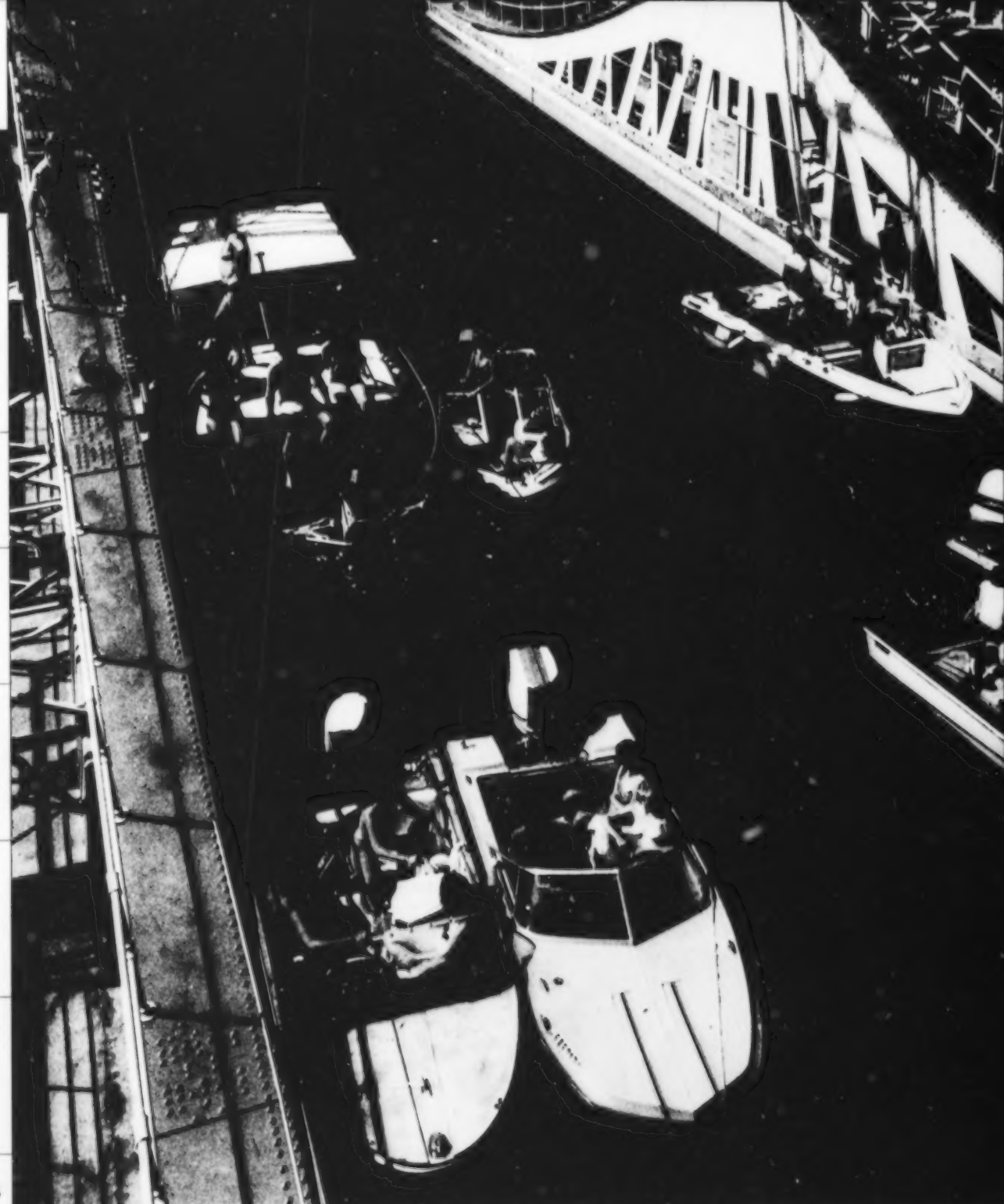
Increased distribution of brochures Decision making/purchases facilitated – consumers have preliminary information to plan trips; Increased awareness of specific Ontario products

Opportunity for Industry Associations and DMOs: Partners can ship brochures to European mailhouses for further distribution to qualified consumers; Recommended that partners have export-ready product and are undertaking (or plan to undertake) promotion activities in UK and/or Germany.

Partners are only responsible for shipping costs (from Ontario to UK/Germany); Costs are based on weight/size/delivery time-frame of shipment

Ongoing; Two months notice required to ensure in-market representatives are properly informed of product and can promote brochure as part of fulfilment to enquires

Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca



United Kingdom Solo-Advertising Campaign	Germany Solo-Advertising Campaign	UK & Germany Direct Mail
January – February 1999: Coincident with CTC advertising activities and key planning time-frame for future summer travel, the campaign highlights Ontario's excitement & unique diversity and "Reason to visit" message	**January – March 1999:** Coincident with CTC advertising activities and key planning time-frame for future summer travel, the campaign highlights excitement & unique diversity to raise "top-of-mind" awareness of Ontario as a must-see, multi-season destination; Goal is to raise awareness to encourage consumers to consider "Ontario is Canada"	**Winter/Shoulder & Late-Fall 1999-2000:** In conjunction with European tour operators/wholesalers and key partners; Direct-to-consumer campaigns to attract short-term traffic to specific products, as defined in product architecture; Value and exchange rate to be promoted where applicable
Newspaper: National press, Weekend editions; Distribution throughout UK	Print (media mix to be determined); Distribution to major German urban centres	As determined by in-market partners (and their associated consumer mailing lists), and by appropriately targeted travel agents
Increased consumer awareness & inquiries; Increased sales of Ontario product	Increased consumer awareness & inquiries; Increased distribution of Ontario & Partner tourism publications; Increased intention-to-travel to Ontario	Decision making/purchases facilitated – consumers have preliminary information to plan trips; Increased sales of seasonal & specific Ontario products
Pending performance of 1998/99 campaign, Ontario Tourism would consider similar 1999/2000 campaign; Target partners would be key UK tour operators who carry Ontario product; Suppliers have opportunity to work with tour operators, on commissioned basis, to get their product in fulfilment brochures	Pending performance of 1998/99 campaign, Ontario Tourism would consider similar 1999/2000 campaign; Target partners would be key German travel trade who carry Ontario product; Suppliers have opportunity to work with travel trade, on commissioned basis, to get their product in fulfilment brochures	As determined by in-market partners, driven by Provincial-Industry partnership; Opportunity to work with operator/wholesaler directly, or within initiatives developed under industry-driven co-op; Ontario Tourism will facilitate program delivery
Pending performance of 1998/99 campaign, program would be developed, and details would be released, by June 1999	Pending performance of 1998/99 campaign, program would be developed, and details would be released, by June 1999	As determined by specific project; Based on direct-mail volume/execution, distribution & partners
It is expected that commitment would be required by August 1999.	It is expected that commitment would be required by August 1999.	Projects typically developed by operators/wholesalers, who would advise potential partners of opportunities at least 2-3 months in advance; However, for industry-driven proposals, applications must be received at least 4 months prior to the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners.
Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

Italy "Discover Ontario" Travel Trade Program	Pan Europe Trade Promotions (General) – Familiarization tours
November 1 – March 31 every year: Product Familiarization: Goal is to raise Italian travel trade's awareness of Ontario's winter product	**January – December 1999, Ongoing/Year-round:** Highlights diversity of Ontario product to European travel trade (tour operators, wholesalers); Goal is to familiarize European travel trade with breadth of Province's tourism offerings, to facilitate the inclusion of Ontario product in their promotions/sales of individual & group tour packages
Throughout Italy (primarily major urban centres); Italian travel industry and selected Italian-based airline sales staff	Familiarization tours are delivered province-wide (general promotion & as identified by travel trade requests)
Increased travel trade awareness of Ontario; Increase in winter consumer packages booked through the travel trade	Improved knowledge of Ontario's product offerings; Increased Ontario product in European tour operator brochures; Increased purchase of Ontario tourism product
Partnership provides in-kind services with the CTC, airlines, Ontario suppliers; This is an MEDTT sponsored educational program; Partners host product testing tours and cover related costs	Familiarization tours: Through either request or through targeting of specific travel trade, the opportunity is to develop tour and host travel parties; Industry may also identify markets/business that they would be interested in approaching (This should be undertaken under "Industry-Driven Initiatives," under which consideration would be given to marketing consortia (with all partners identified); Preference will be given to shoulder & winter months & new product
Host product testing tours – typically in-kind services and cash on an as needed basis – negotiated on per project basis	Familiarization Tours: Typically in-kind services and cash on an as needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
Expression of interest to host tours by April 31 1999; Confirmation of program participation by June 15 1999; Financial commitment required by June 30 1999	Depending on nature of tour (request or pro-active), partners would be advised of forthcoming tours at least 2 months prior to initiative
Proposals to be submitted to Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Proposals to be submitted to Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

	Pan-Europe Media Promotions: News Releases & Press Tours	Pan-Europe Press Media Promotions: Press Luncheons
Timing/Product message	**January – December 1999:** Main concentration – May-October. Working with in-market representatives and CTC Offices, undertake individual & joint ventures. Promote Ontario as a Multi-Season Destination as per product profile – continue to promote icons, in conjunction with city, shopping and theatre/culture theme. Current expansion into Resorts/Muskoka & Algonquin park. Feature touring product – country inns, small towns, parks, events and festivals – as well as niche product – golf, gourmet/wine, wildlife viewing and fishing	**March (UK – 10-12 Media) & November (Germany & France – Each 8-10 Media) 1999:** Working with in-market representatives, host Press Luncheons for key media in respective markets. Provide detailed, unique itineraries, as per product profile, to entice media to chose Ontario as preferred destination for specific articles. Continue to promote icons, in conjunction with city, shopping and theatre/culture theme. Current expansion into Resorts/Muskoka & Algonquin park. Feature touring product – country inns, small towns, parks, events and festivals – as well as niche product – golf, gourmet/wine, wildlife viewing and fishing
	Provide detailed, unique itineraries to entice high-profile TV and print media to chose Ontario as preferred destination for specific articles. Also, provide media, consumer & trade, press tours to Ontario to increase unpaid media coverage. Also promote new airline routes (e.g. London, UK to Ottawa)	Target high-profile TV and print media, including high-end niche/lifestyle, mens and women's magazine, and Internet
Expected results	Increased consumer awareness of Ontario tourism product; 3rd party endorsement for tourism products; Increased Unpaid media coverage	Increased consumer awareness of Ontario tourism product; 3rd party endorsement for tourism products; Increased Unpaid media coverage
	Synchronize media stories with consumer advertising & other promotional activities; Partners – Host media tours/events and cover related costs	Partners – Provide story ideas (pro-active) & Host media tours/events (reactive) and cover related costs Expectation is media will undertake subsequent press tour & eventually provide unpaid coverage. November 1999 initiatives pending based on performance of similar 1998 initiatives
Estimated cost	Typically In-Kind Services, and cash on as-needed basis – negotiated on per project basis	Typically In-Kind Services, and cash on as-needed basis – negotiated on per project basis
	As highlighting "4 season" Product(s) – can indicate availability of in-kind services and willingness to host tours/events	Most resulting press trips are undertaken within one (1) year of luncheon. As highlighting "4 season" Product(s) – can indicate availability of in-kind services and willingness to host tours/events
Contact	Diane Helinski: 416-314-7565	Diane Helinski: 416-314-7565

Italy "Discover Ontario" Travel Trade Program	Pan Europe Trade Promotions (General) - Familiarization tours
November 1 – March 31 every year: Product Familiarization: Goal is to raise Italian travel trade's awareness of Ontario's winter product	**January – December 1999, Ongoing/Year-round:** Highlights diversity of Ontario product to European travel trade (tour operators, wholesalers); Goal is to familiarize European travel trade with breadth of Province's tourism offerings, to facilitate the inclusion of Ontario product in their promotions/sales of individual & group tour packages
Throughout Italy (primarily major urban centres); Italian travel industry and selected Italian-based airline sales staff	Familiarization tours are delivered province-wide (general promotion & as identified by travel trade requests)
Increased travel trade awareness of Ontario; Increase in winter consumer packages booked through the travel trade	Improved knowledge of Ontario's product offerings; Increased Ontario product in European tour operator brochures; Increased purchase of Ontario tourism product
Partnership provides in-kind services with the CTC, airlines, Ontario suppliers; This is an MEDTT sponsored educational program; Partners host product testing tours and cover related costs	Familiarization tours: Through either request or through targeting of specific travel trade, the opportunity is to develop tour and host travel parties; Industry may also identify markets/ business that they would be interested in approaching (This should be undertaken under "Industry-Driven Initiatives," under which consideration would be given to marketing consortia (with all partners identified); Preference will be given to shoulder & winter months & new product
Host product testing tours – typically in-kind services and cash on an as needed basis – negotiated on per project basis	Familiarization Tours: Typically in-kind services and cash on an as needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
Expression of interest to host tours by April 31 1999; Confirmation of program participation by June 15 1999; Financial commitment required by June 30 1999	Depending on nature of tour (request or pro-active), partners would be advised of forthcoming tours at least 2 months prior to initiative
Proposals to be submitted to Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Proposals to be submitted to Jill Ward: 416-314-7367 E-mail: jill.ward@edt.gov.on.ca

partnership opportunities industry initiatives/travel trade, media

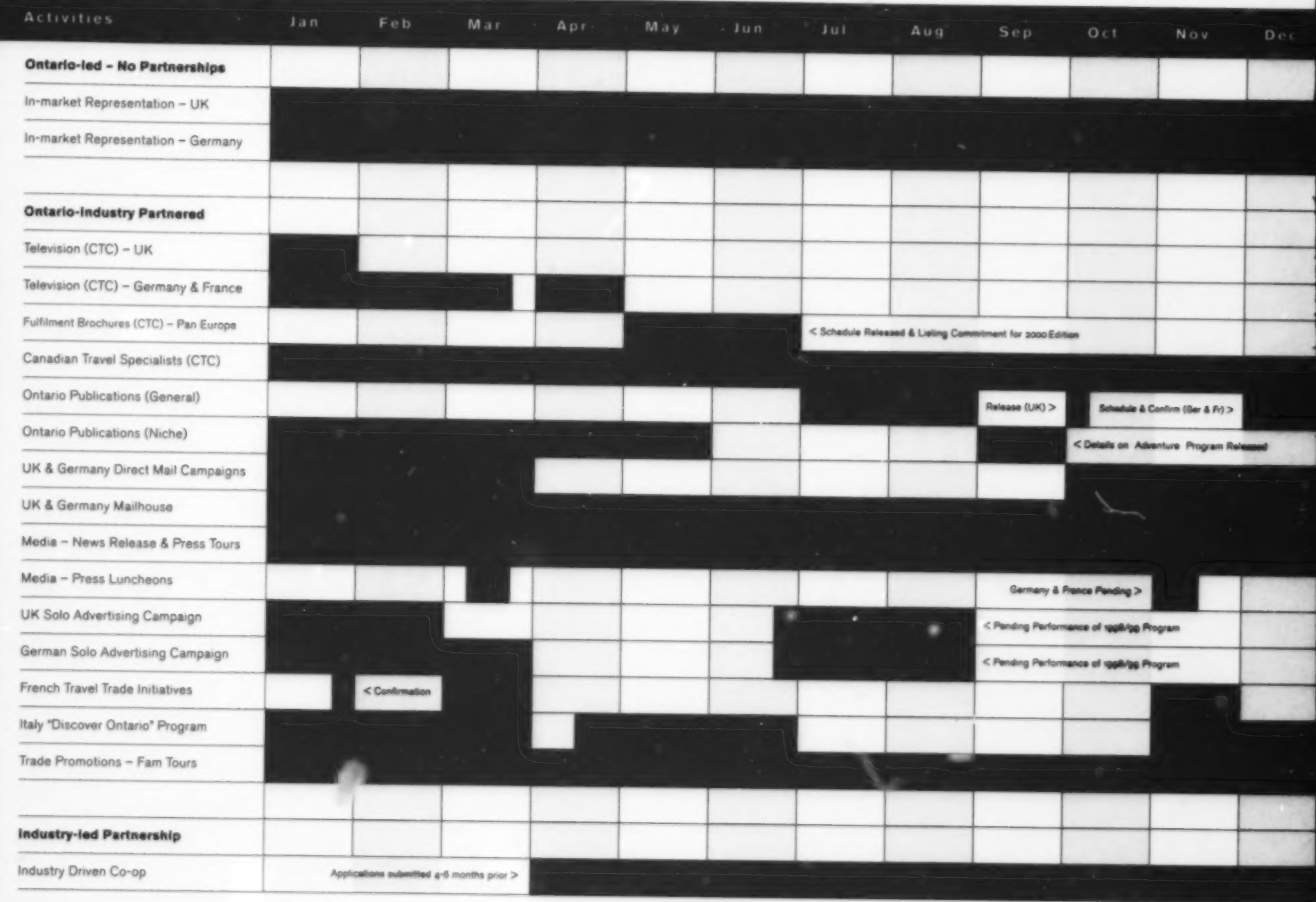
Pan-Europe Media Promotions: News Releases & Press Tours	Pan-Europe Press Media Promotions Press Luncheons
January – December 1999: Main concentration – May-October. Working with in-market representatives and CTC Offices, undertake individual & joint ventures. Promote Ontario as a Multi-Season Destination as per product profile – continue to promote icons, in conjunction with city, shopping and theatre/culture theme. Current expansion into Resorts/Muskoka & Algonquin park. Feature touring product – country inns, small towns, parks, events and festivals – as well as niche product – golf, gourmet/wine, wildlife viewing and fishing	**March (UK – 10-12 Media) & November (Germany & France – Each 8-10 Media) 1999:** Working with in-market representatives, host Press Luncheons for key media in respective markets. Provide detailed, unique itineraries, as per product profile, to entice media to chose Ontario as preferred destination for specific articles. Continue to promote icons, in conjunction with city, shopping and theatre/culture theme. Current expansion into Resorts/Muskoka & Algonquin park. Feature touring product – country inns, small towns, parks, events and festivals – as well as niche product – golf, gourmet/wine, wildlife viewing and fishing
Provide detailed, unique itineraries to entice high-profile TV and print media to chose Ontario as preferred destination for specific articles. Also, provide media, consumer & trade, press tours to Ontario to increase unpaid media coverage. Also promote new airline routes (e.g. London, UK to Ottawa)	Target high-profile TV and print media, including high-end niche/lifestyle, mens and women's magazine, and Internet
Increased consumer awareness of Ontario tourism product; 3rd party endorsement for tourism products; Increased Unpaid media coverage	Increased consumer awareness of Ontario tourism product; 3rd party endorsement for tourism products; Increased Unpaid media coverage
Synchronize media stories with consumer advertising & other promotional activities; Partners – Host media tours/events and cover related costs	Partners – Provide story ideas (pro-active) & Host media tours/events (reactive) and cover related costs Expectation is media will undertake subsequent press tour & eventually provide unpaid coverage. November 1999 initiatives pending based on performance of similar 1998 initiatives
Typically In-Kind Services, and cash on as-needed basis – negotiated on per project basis	Typically In-Kind Services, and cash on as-needed basis – negotiated on per project basis
As highlighting '4 season' Product(s) – can indicate availability of in-kind services and willingness to host tours/events	Most resulting press trips are undertaken within one (1) year of luncheon. As highlighting '4 season' Product(s) – can indicate availability of in-kind services and willingness to host tours/events
Diane Helinski: 416-314-7565 E-mail: diane.helinski@edt.gov.on.ca	Diane Helinski: 416-314-7565 E-mail: diane.helinski@edt.gov.on.ca

ontario tourism

1999 program schedule **European Trade Shows and Marketplaces**

	BIT International Tourism Exchange	Spotlight Canada	International Tourismus	European Incentive, Business Travel and Meetings Show (To be determined)	World Travel Market (To be determined)
Date	Feb 24-28, 1999	Mar 1-3, 1999	Mar 6-10, 1999	May 1999	Nov, 1999
Location	Milan, Italy	London, England	Berlin, Germany	Geneva, Switzerland	London, England
Target Audience	Travel trade, Media, Meetings & Incentive trade	Travel trade, Media, Meetings & Incentive trade	Travel trade, Consumer, Media	Meetings & Incentive trade	Travel trade, Media
Description	Opportunity to meet with Italian media and travel trade; Annual event, typically attracting 4800 exhibitors from around the world	Opportunity to meet with up to 100 UK tour operators, incentive travel firms and media at a single, highly focused event; Typically attracts 2800 travel professionals from across Europe	World's top tourism fair; Opportunity to showcase product to over 50,000 travel trade representatives	Opportunity to meet with European incentive and business travel buyers	UK's largest trade show; Opportunity to showcase product to tour operators and wholesalers
Partner cost	Registration: $Cdn 1,500; Coordinated by CTC & MEDTT	Registration: $Cdn 2,500; Coordinated by CTC & MEDTT	Registration: $Cdn 3,000; Coordinated by CTC & MEDTT	Registration: $Cdn 3,500; Coordinated by CTC & MEDTT	Registration: $Cdn 4,000; Coordinated by CTC & MEDTT
Contact	Jill Ward, 416-314-7367 E-mail: jill.ward@edt.gov.on.ca	Paulette Clarke, 416-314-7572 E-mail: paulette.clarke@edt.gov.on.ca	Paulette Clarke, 416-314-7572 E-mail: paulette.clarke@edt.gov.on.ca	Paulette Clarke, 416-314-7572 E-mail: paulette.clarke@edt.gov.on.ca	Paulette Clarke, 416-314-7572 E-mail: paulette.clarke@edt.gov.on.ca

european markets 1999 – blocking chart marketing activities by month



D

asia pacific

Major economies in the Asia Pacific region were in decline in 1997, and are undergoing significant structural adjustments. The Asian financial crisis has affected most economies throughout the world. As a result of continuing financial crises in the region, 1998's travel volumes and revenues from Asian markets continued to decline, showing only slight recovery towards year-end. Among Japanese travellers, Ontario took over as the number one destination for visitors in terms of overnight visits (38% share). This was mainly due to interest in Niagara Falls. The stay-per-visit average remained flat, but expenditures per night have increased.

The outlook for 1999 is pessimistic. Further declines and continued lower visitation levels are expected over the next two years. For travellers in these markets, the trend is toward an increased predisposition to domestic and intra-regional travel, as well as greater price sensitivity. Consumers will steer away from destinations perceived to be expensive.

asia pacific

D

Customer Profile

Target Audience, Market Segments

Middle-aged and 'silver-haired' couples (43% of trips): Adults 45+, travelling with and without families; affluent, conservative, interested in self-fulfilment and safety, appreciative of the 'Zen of Nature'

Honeymoon couples: Adults 18-29; Niagara Falls is a premier romantic icon

Office Ladies (19% of trips): Single working women, 18-44; attracted to group/package travel

Shugaku Ryoko (Students): Youths and young adults 16-21; they consider Ontario a safe place to learn English; appreciate friendly Canadian culture; influence family and friends to visit province

Developing Markets

Taiwan: families, young educated travellers

Hong Kong: 'Chuppies' – young affluent travellers, families

Australia and New Zealand: families, middle-aged retired couples, young educated travellers

consumer trends: japanese travelling overseas

Canadian tourism operators should take note of the following trends in outbound travel from Japan:

- Declining real costs of travelling to many long-haul destinations due to growth of charter destinations, especially in Southeast Asia, Australia and Europe
- An increasingly mature and sophisticated market that is more willing to explore far-flung destinations
- Package choices are an important factor in closing the sale
- Customer service, cultural sensitivity and language proficiency are important
- There is growing interest in specialized outdoor products at long-haul destinations (e.g., adventure, nature/outdoor activities and learning vacations)
- Safety continues to be an important factor

ontario tourism consumer tracking; japan travel bureau, and world tourism organization: 1997 and 1998

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

Summer (July - August)	Fall (September - November)
Outdoors (soft adventure) Overnight cruises (Georgian Bay), Short cruises, Spectacles, ESL student homestays, Summer festivals, Small towns, unique communities, Walking/hiking routes, Special interest/educational & enrichment, Summer Maple Route touring **Hard adventure** Provincial parks, Wildwater preserve, Ecological adventures, Waterways, Resorts/golf, Provincial parks **Traditional** Summer Maple Route touring, Shopping, ***Cities/attractions:*** Toronto, Niagara Falls, Ottawa, Spectacles, Wine touring Ecotourism (Birds, butterflies)	Attractions, Professional sports, Shopping **Maple Route touring, Algonquin Kaido, Fall colours, Small towns, unique communities, Wine region, Rail, Niagara Marathon** **Harvest festivals & fall fairs, Heritage, Shopping** **Soft Adventure** Wildlife viewing, Provincial parks, Ecotourism (Butterflies, birding [migration]), Golf

product profile *Note: Product architecture to evolve based on industry's input.

	Winter (December - March)	Spring (April - June)
	Events and Festivals Consumer shows, other indoor & outdoor activities ***Attractions*** Theatre & performing arts, professional sports, indoor and outdoor attractions ***Activities and Experiences*** Shopping, dining ***Special interest tours*** Hospitals/Seniors/Homes/Critical care/Social and technical programs	***Activities and Experiences*** ***Attractions*** Festivals (Tulip festivals, 1999 Japan Festival), shopping
	Festivals Winter carnivals, Lights festivals, Maple syrup festivals, Las Vegas-style shows, Add-on touring products Regional Touring product to be determined: N.B. Reverse seasonality opportunities with southern hemisphere markets	***Southwest/East*** Spring Maple Route Heritage (especially British Canadian history), Wine region Festivals (e.g., Niagara Blossom festival), Golf (starting 1st week of April), Maple syrup festivals, short cruises ***Student programs*** Homestay/ESL (English as a Second Language) Touring ***North & Central*** Touring product to be determined
	Soft adventure Small guided tours, aimed at younger and repeat visitors, combined with touring products – dogsledding, sleighrides, 'Night-vision' tours, resorts & apres ski, etc.	***North*** Wildlife, Provincial parks (open in May) ***Southwest/East*** Ecotourism: Birding (migration, trumpeter swans), Spring blossom Walks Provincial parks, Butterfly migration, Golf (starting 1st week of April)

Summer (July - August)	Fall (September - November)
Outdoors (soft adventure) Overnight cruises (Georgian Bay), Short cruises, Spectacles, ESL student homestays, Summer festivals, Small towns, unique communities, Walking/hiking routes, Special interest/educational & enrichment, Summer Maple Route touring **Hard adventure** Provincial parks, Wildwater preserve, Ecological adventures, Waterways, Resorts/golf, Provincial parks **Traditional** Summer Maple Route touring, Shopping, *Cities/attractions:* Toronto, Niagara Falls, Ottawa, Spectacles, Wine touring Ecotourism (Birds, butterflies)	Attractions, Professional sports, Shopping Maple Route touring, Algonquin Kaido, Fall colours, Small towns, unique communities, Wine region, Rail, Niagara Marathon Harvest festivals & fall fairs, Heritage, Shopping **Soft Adventure** Wildlife viewing, Provincial parks, Ecotourism (Butterflies, birding [migration]), Golf

product profile *Note: Product architecture to evolve based on industry's input.

	Winter (December - March)	Spring (April - June)
City	***Events and Festivals*** Consumer shows, other indoor & outdoor activities ***Attractions*** Theatre & performing arts, professional sports, indoor and outdoor attractions ***Activities and Experiences*** Shopping, dining ***Special interest tours*** Hospitals/Seniors/Homes/Critical care/Social and technical programs	***Activities and Experiences*** ***Attractions*** Festivals (Tulip festivals, 1999 Japan Festival), shopping
	Festivals Winter carnivals, Lights festivals, Maple syrup festivals, Las Vegas-style shows, Add-on touring products Regional Touring product to be determined: N.B. Reverse seasonality opportunities with southern hemisphere markets	***Southwest/East*** Spring Maple Route Heritage (especially British Canadian history), Wine region Festivals (e.g., Niagara Blossom festival), Golf (starting 1st week of April), Maple syrup festivals, short cruises ***Student programs*** Homestay/ESL (English as a Second Language) Touring ***North & Central*** Touring product to be determined
Outdoor	***Soft adventure*** Small guided tours, aimed at younger and repeat visitors, combined with touring products – dogsledding, sleighrides, 'Night-vision' tours, resorts & apres ski, etc.	***North*** Wildlife, Provincial parks (open in May) ***Southwest/East*** Ecotourism: Birding (migration, trumpeter swans), Spring blossom Walks Provincial parks, Butterfly migration, Golf (starting 1st week of April)

Marketing Focus

Goals

- Position Ontario as a premier, four-season destination
- Establish strategic long-term partnerships to promote Ontario in Asia Pacific markets
- Develop tactical partnership opportunities for Ontario DMOs and suppliers

Objectives

- Maintain market share in a recessionary environment: Minimize further erosion and maintain revenue over the next two years
- Maintain commitment to Asian markets and thereby position Ontario to grow market share when these economies rebound
- Encourage travel beyond the traditional Niagara Falls and Maple touring route (Japan only)

Strategy

Strengthen awareness of Ontario

- Establish Ontario as the premier Eastern Canadian destination in summer and shoulder seasons
- Emphasize Ontario's uniquely different 'gentle nature'

Position Ontario as Gateway to Eastern Canada

- Establish a revitalized image of Ontario
- Promote Toronto as the gateway to Ontario, Eastern Canada and the Northeastern US

Maintain CTC relationship

- Continue to build on the relationship with CTC and its other partners, including tour operators, media, airlines and the Ontario tourism industry

Focus on Value

- Enhance and promote the price competitiveness of Ontario's diverse products and packages

Highlight Ontario's Unique and Diverse Product

- Focus and build on the popularity of the Maple Route
- Strengthen the profile of non-snow winter activities
- Improve messaging of Ontario's culture, heritage, romance and superior nature

demographic trends in japan

	1997	2005
Population	*125.7 million*	*127.6 million*
20-34	22.8%	20.3%
35-49	21.4%	19.2%
50-64	19.3%	21.4%

Japan has an aging population. Within the next decade, the 'young senior' segment (50-64) will grow by over 11% (almost 3 million people). This is the most wealthy segment of the population and presents opportunities for new travel experiences, such as soft adventure (e.g., biking, birding) and wine route touring.

u.s. census bureau, ontario consumer tracking and world tourism organization, 1998

Despite continued slow economic growth in 1999 and 2000, travel by residents of the East Asia Pacific region is expected to pick up quickly and strongly as a result of improvements to local currency values.

research by world tourism organization

Marketing Focus

Goals

- Position Ontario as a premier, four-season destination
- Establish strategic long-term partnerships to promote Ontario in Asia Pacific markets
- Develop tactical partnership opportunities for Ontario DMOs and suppliers

Objectives

- Maintain market share in a recessionary environment: Minimize further erosion and maintain revenue over the next two years
- Maintain commitment to Asian markets and thereby position Ontario to grow market share when these economies rebound
- Encourage travel beyond the traditional Niagara Falls and Maple touring route (Japan only)

Strategy

Strengthen awareness of Ontario

- Establish Ontario as the premier Eastern Canadian destination in summer and shoulder seasons
- Emphasize Ontario's uniquely different 'gentle nature'

Position Ontario as Gateway to Eastern Canada

- Establish a revitalized image of Ontario
- Promote Toronto as the gateway to Ontario, Eastern Canada and the Northeastern US

Maintain CTC relationship

- Continue to build on the relationship with CTC and its other partners, including tour operators, media, airlines and the Ontario tourism industry

Focus on Value

- Enhance and promote the price competitiveness of Ontario's diverse products and packages

Highlight Ontario's Unique and Diverse Products

- Focus and build on the popularity of the Maple Route
- Strengthen the profile of non-snow winter activities
- Improve messaging of Ontario's culture, heritage, romance and superior nature

demographic trends in japan

	1997	2005
Population	*125.7 million*	*127.6 million*
20-34	21.8%	20.3%
35-49	21.4%	19.2%
50-64	19.5%	21.4%

Japan has an aging population. Within the next decade, the 'young senior' segment (50-64) will grow by over 11% (almost 3 million people). This is the most wealthy segment of the population and presents opportunities for new travel experiences, such as soft adventure (e.g., hiking, birding) and wine route touring.

u.s. census bureau, ontario consumer tracking and world tourism organization, 1998

Despite continued slow economic growth in 1999 and 2000, travel by residents of the East Asia Pacific region is expected to pick up quickly and strongly as a result of improvements to local currency values.

research by world tourism organization

partnership opportunities advertising/media plan

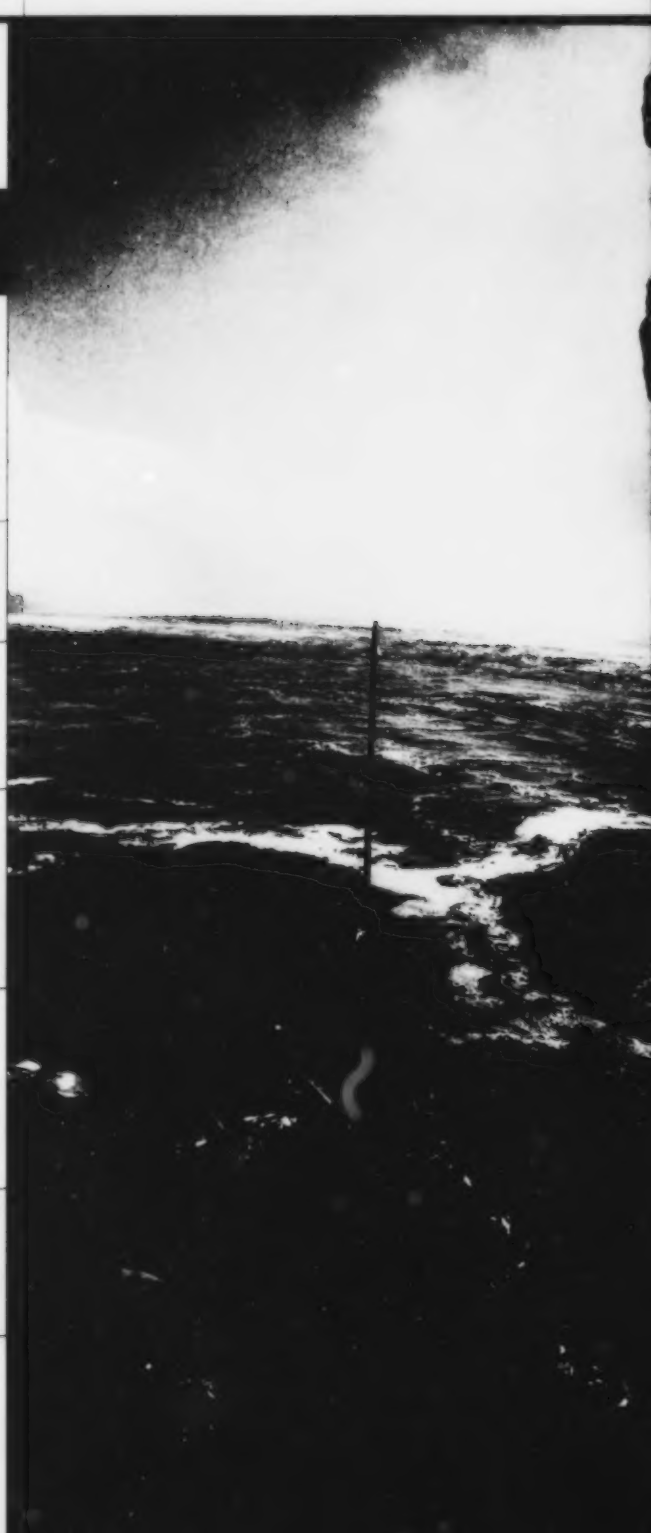
Japan	Winter "Hard sell" Newspaper & Poster campaigns	Advertising/Tour - Canadian Tulip festival
	Nov 1998 – March 1999 & Nov 1999 – March 2000: "Hard sell" Newspaper campaign: Highlights the excitement & diversity of Ontario's tourism products in combination with consumer vacation packages offered by Japanese tour operators **January – December 1999: Poster Campaign:** Travel agency window displays in major urban centres, featuring high impact images of key Ontario product	**May 1999:** consumer advertising campaign, delivered under umbrella of winter "Hard Sell" campaign, in which key product promoted is the Canadian Tulip Festival, Ottawa; The campaign would culminate with consumer tours to the festival in April; Goal is to create new Ontario products
	Winter "Hard Sell" Campaign: Consumer advertising, daily newspapers in Tokyo, Nagoya, Kansai region; **Poster Campaign:** Travel Agency Window displays in Tokyo, Nagoya and Osaka	As identified in Winter "Hard Sell" campaign: Major urban centres (Tokyo, Nagoya, Kansai Region)
	Increased consumer awareness; Decision-making/purchases facilitated – consumers have information on travel/cost options; Sales exceeding 5000 new tour packages from Japan	Increased consumer awareness; Increased visitation and new tour packages, including Ottawa
	Winter "Hard Sell" Campaign: Consumer advertising in partnership with CTC, airlines, Japanese tour operators and provinces; Ontario suppliers have opportunity to work with tour operators, to get their product in fulfilment brochures **Poster Campaign:** For image & awareness-building only	Consumer advertising in partnership with CTC, airlines, Japanese tour operators and provinces; Ontario suppliers have opportunity to work with tour operators, to get their product in fulfilment brochures
	Winter "Hard Sell" Program guidelines for 2000/2001 will be available in June 1999; Minimum Cost – $20,000 per program partnership opportunity; Typically undertaken with large Japanese tour operators (typically delivered in partnership with 4 – 5 key operators), and cost-shared with CTC, airlines, and partner consortia	Minimum Cost – $10,000 per program partnership opportunity; Undertaken with large Japanese tour operators (delivered in partnership with 4 – 5 key operators), and cost-shared with CTC and airlines; Note: Various Japanese tour operators are involved in this special event and tour arrangements have already been made
	Winter "Hard Sell" Campaign: Expression of interest by August 1999; Confirmation of participation & financial commitment by September 1999; Ontario initiatives will be formally announced at Kanata in October 1999	As initiative is already in motion, opportunities for partnership are immediate; Expression of interest, confirmation of participation, and financial commitment are required December 31, 1998
	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

CTC Vacation Planner	Discover Ontario Program (Travel Trade)
February 1999: Publication delivered directly to consumers, intended to raise consumer awareness of Canada and Ontario; Highlights key product, within the context of Eastern Canada; Used as fulfilment for subsequent consumer inquiries from May to October 1999	**November 1 – March 31 every year:** Product Familiarization; Goal is to raise Japanese travel agents' awareness of Ontario's winter Product
30,000 copies of the Vacation Planner are distributed with "Blanca" Magazine to consumers in Tokyo, Nagoya and Osaka	Throughout Japan (primarily major urban centres); Japanese travel industry and selected Japanese-based airline sales staff
Fulfilment pieces to be distributed: Increased consumer awareness; Decision making/purchases facilitated – consumers have information in-hand; Increase in Canadian tour packages sold by Japanese tour operators	Increased travel trade awareness of Ontario; Increase in consumer packages booked through the travel trade
This is a CTC consumer campaign with "Blanca" magazine; Opportunity for partners to advertise in Blanca Magazine and to be included in the Vacation Planner	Partnership in in-kind services with the CTC, airlines, Ontario suppliers; This is an MEDTT-sponsored educational program.
As identified in CTC Asia Pacific Marketing Plan; Costs typically range from $20,000 – $30,000, depending on level of participation	Hosting of product testing tours: typically in-kind services, and cash on an as-needed basis; Negotiated on per project basis
For 2000 issue : expression of interest by June 1999; Confirmation of partnership by July 1999, with financial commitment required by October 1999 (when production on "Blanca" begins)	Expression of interest to host tours by April 30, 1999; Confirmation of program participation by June 15, 1999; Financial commitment required by June 30, 1999
CTC Contacts, as identified in Asia-Pacific Marketing Plan; Opportunities will be facilitated by John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

partnership opportunities advertising/media plan

Japan	Winter "Hard sell" Newspaper & Poster campaigns	Advertising/Tour - Canadian Tulip festival
Timing/Product message	**Nov 1998 - March 1999 & Nov 1999 - March 2000: "Hard sell" Newspaper campaign:** Highlights the excitement & diversity of Ontario's tourism products in combination with consumer vacation packages offered by Japanese tour operators **January - December 1999: Poster Campaign:** Travel agency window displays in major urban centres, featuring high impact images of key Ontario product	**May 1999:** consumer advertising campaign, delivered under umbrella of winter "Hard Sell" campaign, in which key product promoted is the Canadian Tulip Festival, Ottawa; The campaign would culminate with consumer tours to the festival in April; Goal is to create new Ontario products
	Winter "Hard Sell" Campaign: Consumer advertising, daily newspapers in Tokyo, Nagoya, Kansai region; **Poster Campaign:** Travel Agency Window displays in Tokyo, Nagoya and Osaka	As identified in Winter "Hard Sell" campaign: Major urban centres (Tokyo, Nagoya, Kansai Region)
Expected results	Increased consumer awareness; Decision-making/purchases facilitated – consumers have information on travel/cost options; Sales exceeding 5000 new tour packages from Japan	Increased consumer awareness; Increased visitation and new tour packages, including Ottawa
	Winter "Hard Sell" Campaign: Consumer advertising in partnership with CTC, airlines, Japanese tour operators and provinces; Ontario suppliers have opportunity to work with tour operators, to get their product in fulfilment brochures **Poster Campaign:** For image & awareness-building only	Consumer advertising in partnership with CTC, airlines, Japanese tour operators and provinces; Ontario suppliers have opportunity to work with tour operators, to get their product in fulfilment brochures
Estimated cost	**Winter "Hard Sell"** Program guidelines for 2000/2001 will be available in June 1999; Minimum Cost – $20,000 per program partnership opportunity; Typically undertaken with large Japanese tour operators (typically delivered in partnership with 4 – 5 key operators), and cost-shared with CTC, airlines, and partner consortia	Minimum Cost – $10,000 per program partnership opportunity; Undertaken with large Japanese tour operators (delivered in partnership with 4 – 5 key operators), and cost-shared with CTC and airlines; Note: Various Japanese tour operators are involved in this special event and tour arrangements have already been made
	Winter "Hard Sell" Campaign: Expression of interest by August 1999; Confirmation of participation & financial commitment by September 1999; Ontario initiatives will be formally announced at Kanata in October 1999	As initiative is already in motion, opportunities for partnership are immediate; Expression of interest, confirmation of participation, and financial commitment are required December 31, 1998
Contact	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

CTC Vacation Planner	Discover Ontario Program (Travel Trade)
February 1999: Publication delivered directly to consumers, intended to raise consumer awareness of Canada and Ontario; Highlights key product, within the context of Eastern Canada; Used as fulfilment for subsequent consumer inquiries from May to October 1999	**November 1 – March 31 every year:** Product Familiarization; Goal is to raise Japanese travel agents' awareness of Ontario's winter Product
30,000 copies of the Vacation Planner are distributed with "Blanca" Magazine to consumers in Tokyo, Nagoya and Osaka	Throughout Japan (primarily major urban centres); Japanese travel industry and selected Japanese-based airline sales staff
Fulfilment pieces to be distributed: Increased consumer awareness; Decision making/purchases facilitated – consumers have information in-hand; Increase in Canadian tour packages sold by Japanese tour operators	Increased travel trade awareness of Ontario; Increase in consumer packages booked through the travel trade
This is a CTC consumer campaign with "Blanca" magazine; Opportunity for partners to advertise in Blanca Magazine and to be included in the Vacation Planner	Partnership in in-kind services with the CTC, airlines, Ontario suppliers; This is an MEDTT-sponsored educational program.
As identified in CTC Asia Pacific Marketing Plan; Costs typically range from $20,000 – $30,000, depending on level of participation	Hosting of product testing tours: typically in-kind services, and cash on an as-needed basis; Negotiated on per project basis
For 2000 issue : expression of interest by June 1999; Confirmation of partnership by July 1999, with financial commitment required by October 1999 (when production on "Blanca" begins)	Expression of interest to host tours by April 30, 1999; Confirmation of program participation by June 15, 1999; Financial commitment required by June 30, 1999
CTC Contacts, as identified in Asia-Pacific Marketing Plan; Opportunities will be facilitated by John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca



Japan: Consumer Activities, Niagara Falls "Japan Week" & International Marathon	Asia-Pacific: Trade Shows & Marketplaces
"Japan Week", May 8-13, 1999: Week-long festival, in Niagara Falls, Canada, showcasing Japanese arts & culture **"Niagara Falls International Marathon", October 1999:** International Marathon Race, held across US & Canadian border	Refer to following Tables for time-frames: Ontario presence at shows will showcase unique and diverse product as well as value and accessibility
"Japan Week": Although held in Niagara Falls, this event is expected to garner media attention across North America & Japan; Event would also be tied-in with promotional activities in Japan (i.e.; Winter "Hard Sell" campaign, direct mail & media promotions) **"Niagara Falls International Marathon":** Live television race coverage in Japan, plus domestic & international press coverage	Asian Pacific tour operators, wholesalers and travel agents in targeted markets: Japan, Taiwan, Hong Kong, Australia & New Zealand
Increased consumer awareness; Increase in tour packages and visitation: 1500 incremental visitors from Japan, 5000 from US, and 25000 Ontario residents are expected to attend	Increased travel trade awareness of Ontario's tourism product; Increased quantity of group and individual overnight packaged vacations sold through the Asian Pacific travel trade; Increased interest beyond Maple Route to include all areas of Ontario (Japan)
"Japan Week:" Partnership opportunities would be negotiated with International Friendship Foundation & Niagara Falls, Canada VCB **"Niagara Falls International Marathon:"** Consumer advertising in partnership with the CTC, JTB, airlines, and Niagara Falls VCB; MEDTT is a partner in this program; Opportunity for Ontario suppliers to host Japanese media/travel trade	Participation in trade shows and marketplaces; Subsequent product testing, familiarization tours for tour operators/travel agents; Opportunity to host and develop tour; Preference will be given to shoulder & winter months & new product
"Japan Week": Program guidelines will be released January 1999 **"Niagara Falls International Marathon":** Determined by level of participation; Partners hosting media/travel trade will provide in-kind services	Participation fee for shows range from $1000 – $5500 plus travel costs Familiarization Tours: Typically in-kind services, and cash on as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
"Japan Week": Expression of interest by December 1998; Confirmation of participation by January 1999; Partnership/financial commitment by early February 1999 **"Niagara Falls International Marathon":** Expression of interest by January 1999; Confirmation of participation by June 1999; Financial commitment required by mid-July 1999	Information on specific shows and costs will be available February 1999 (details following); Depending on nature of tour, partners will be advised of forthcoming tours at least 2 months prior to initiative
Noel Buckley, President, Niagara Falls, Canada, Visitor & Convention Bureau 1-905-356-6061, extension 17; Japan week International Friendship Foundation, 416-594-9209	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

	Asia Pacific Industry-driven Co-op Initiatives
Timing/Product message	**April 1999 – March 2000:** As driven by product architecture, focuses on outdoor recreational product, touring, and new, unique & different, with preference for shoulder & winter season; Must be new: new market, medium, product, partnerships and/or consumer promotion
	As identified in proposals
Expected results	Consumer awareness of Ontario's product strengths; Increased purchases of Ontario tourism product
	Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); Full details on program will be available by February 28, 1999; Initiative should be fully integrated to raise & fulfil interest, and can be advertising, trade, consumer or media, or any combination; Proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis; Consideration will be given to CTC programs that the Province has not accessed to date
Estimated cost	To ensure reasonable impact, suggested minimum funding for individual initiatives is $50,000; Matching contributions will be available from the Province, i.e., industry would provide a minimum of $25,000 per initiative
	Applications must be received at least 6 months prior to commencement of the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners
Contact	Proposals to be submitted to John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca

Japan: Consumer Activities, Niagara Falls "Japan Week" & International Marathon	Asia-Pacific: Trade Shows & Marketplaces
"Japan Week", May 8-13, 1999: Week-long festival, in Niagara Falls, Canada, showcasing Japanese arts & culture **"Niagara Falls International Marathon", October 1999:** International Marathon Race, held across US & Canadian border	Refer to following Tables for time-frames: Ontario presence at shows will showcase unique and diverse product as well as value and accessibility
"Japan Week": Although held in Niagara Falls, this event is expected to garner media attention across North America & Japan; Event would also be tied-in with promotional activities in Japan (i.e.; Winter "Hard Sell" campaign, direct mail & media promotions) **"Niagara Falls International Marathon":** Live television race coverage in Japan, plus domestic & international press coverage	Asian Pacific tour operators, wholesalers and travel agents in targeted markets: Japan, Taiwan, Hong Kong, Australia & New Zealand
Increased consumer awareness; Increase in tour packages and visitation: 1500 incremental visitors from Japan, 5000 from US, and 25000 Ontario residents are expected to attend	Increased travel trade awareness of Ontario's tourism product; Increased quantity of group and individual overnight packaged vacations sold through the Asian Pacific travel trade; Increased interest beyond Maple Route to include all areas of Ontario (Japan)
"Japan Week:" Partnership opportunities would be negotiated with International Friendship Foundation & Niagara Falls, Canada VCB **"Niagara Falls International Marathon:"** Consumer advertising in partnership with the CTC, JTB, airlines, and Niagara Falls VCB; MEDTT is a partner in this program; Opportunity for Ontario suppliers to host Japanese media/travel trade	Participation in trade shows and marketplaces; Subsequent product testing, familiarization tours for tour operators/travel agents; Opportunity to host and develop tour; Preference will be given to shoulder & winter months & new product
"Japan Week": Program guidelines will be released January 1999 **"Niagara Falls International Marathon":** Determined by level of participation; Partners hosting media/travel trade will provide in-kind services	Participation fee for shows range from $1000 – $5500 plus travel costs Familiarization Tours: Typically in-kind services, and cash on as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
"Japan Week": Expression of interest by December 1998; Confirmation of participation by January 1999; Partnership/financial commitment by early February 1999 **"Niagara Falls International Marathon":** Expression of interest by January 1999; Confirmation of participation by June 1999; Financial commitment required by mid-July 1999	Information on specific shows and costs will be available February 1999 (details following); Depending on nature of tour, partners will be advised of forthcoming tours at least 2 months prior to initiative
Noel Buckley, President, Niagara Falls, Canada, Visitor & Convention Bureau 1-905-356-6061, extension 17; Japan week International Friendship Foundation, 416-594-9209	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

Asia Pacific Industry-driven Co-op Initiatives

April 1999 – March 2000: As driven by product architecture, focuses on outdoor recreational product, touring, and new, unique & different, with preference for shoulder & winter season; Must be new: new market, medium, product, partnerships and/or consumer promotion

As identified in proposals

Consumer awareness of Ontario's product strengths; Increased purchases of Ontario tourism product

Industry-led initiative: Consideration will only be given to marketing consortia (with all partners identified); Full details on program will be available by February 28, 1999; Initiative should be fully integrated to raise & fulfil interest, and can be advertising, trade, consumer or media, or any combination; Proposals submitted with other Provincial Partnership programs will be evaluated on a case-by-case basis; Consideration will be given to CTC programs that the Province has not accessed to date

To ensure reasonable impact, suggested minimum funding for individual initiatives is $50,000; Matching contributions will be available from the Province, i.e., industry would provide a minimum of $25,000 per initiative

Applications must be received at least 6 months prior to commencement of the initiative; Funding may be reduced or rescinded based on non-performance of contract with Province/Partners

Proposals to be submitted to John Cole: 416-314-7566
E-mail: john.cole@edt.gov.on.ca

ontario tourism

1999 program schedule **Asia Pacific Developing Markets/Trade Shows and marketplaces**

	Canada Comeback	Canada Calling	Canadian Travel Specialist Program	Active America (Northwest Airlines)	VUSAMART	Kanata Trade Show	CTC Asia Showcase
Date	January 1999	January 1999	January 1999	April 1999	September 1999	October 1999	October 1999 (Usually following Kanata)
Location	Australia - Major urban centres	New Zealand	Australia – Gold Coast	US - Various cities	US - Various cities	Japan - Key urban centres	Taipei, Hong Kong, Seoul, Malaysia
Target Audience	Travel trade	Travel trade	Travel trade	Travel trade	Travel trade	Travel trade	Travel trade
Description	Opportunity to meet with approx. 1800 travel agents, tour operators and media in 6 key Australian cities	Opportunity to meet with key travel agents, tour operators and media; Focuses on packaged product from New Zealand and to Canada & Ontario	Provides seminars to approx. 500 travel agents in a weekend of intensive product education activities	Annual show highlighting new products that can be accessed through Northwest Airlines (worldwide)	Educational & business conference to facilitate the development of travel to the Americas from key Asia Pacific regions	Opportunity to meet with Japan's top travel agents, tour operators and media (approx. 200)	Opportunity to meet with key Asian travel trade to increase awareness of Ontario and to develop Ontario product to be featured in their tour publications
Partner cost	Registration: $Aus 3,800; Coordinated by CTC	Registration: $Cdn 2,400; Coordinated by CTC	Registration: $Aus 4,000; Coordinated by CTC	Registration: $US 1,000; Participation by invitation; Coordinated by Travel America	Registration: $US 1,500; Coordinated by PATA	Registration: $Cdn 5,000; Coordinated by CTC & MEDTT	Registrations fees (approx.): Taiwan: $Cdn 1,200 S. Korea: $Cdn 1,000 Hong Kong: $Cdn 1,000 Malaysia: $Cdn 850
Contact	John Cole, 416-314-7566 E-mail: john.cole@edt.gov.on.ca Brenda McIntosh, 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca	John Cole, 416-314-7566 E-mail: john.cole@edt.gov.on.ca Brenda McIntosh, 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca	John Cole, 416-314-7566 E-mail: john.cole@edt.gov.on.ca Brenda McIntosh, 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca	John Cole, 416-314-7566 E-mail: john.cole@edt.gov.on.ca Brenda McIntosh, 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca	John Cole, 416-314-7566 E-mail: john.cole@edt.gov.on.ca Brenda McIntosh, 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca	John Cole, 416-314-7566 E-mail: john.cole@edt.gov.on.ca Brenda McIntosh, 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca	John Cole, 416-314-7566 E-mail: john.cole@edt.gov.on.ca Brenda McIntosh, 416-314-5492 E-mail: brenda.mcintosh @edt.gov.on.ca

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

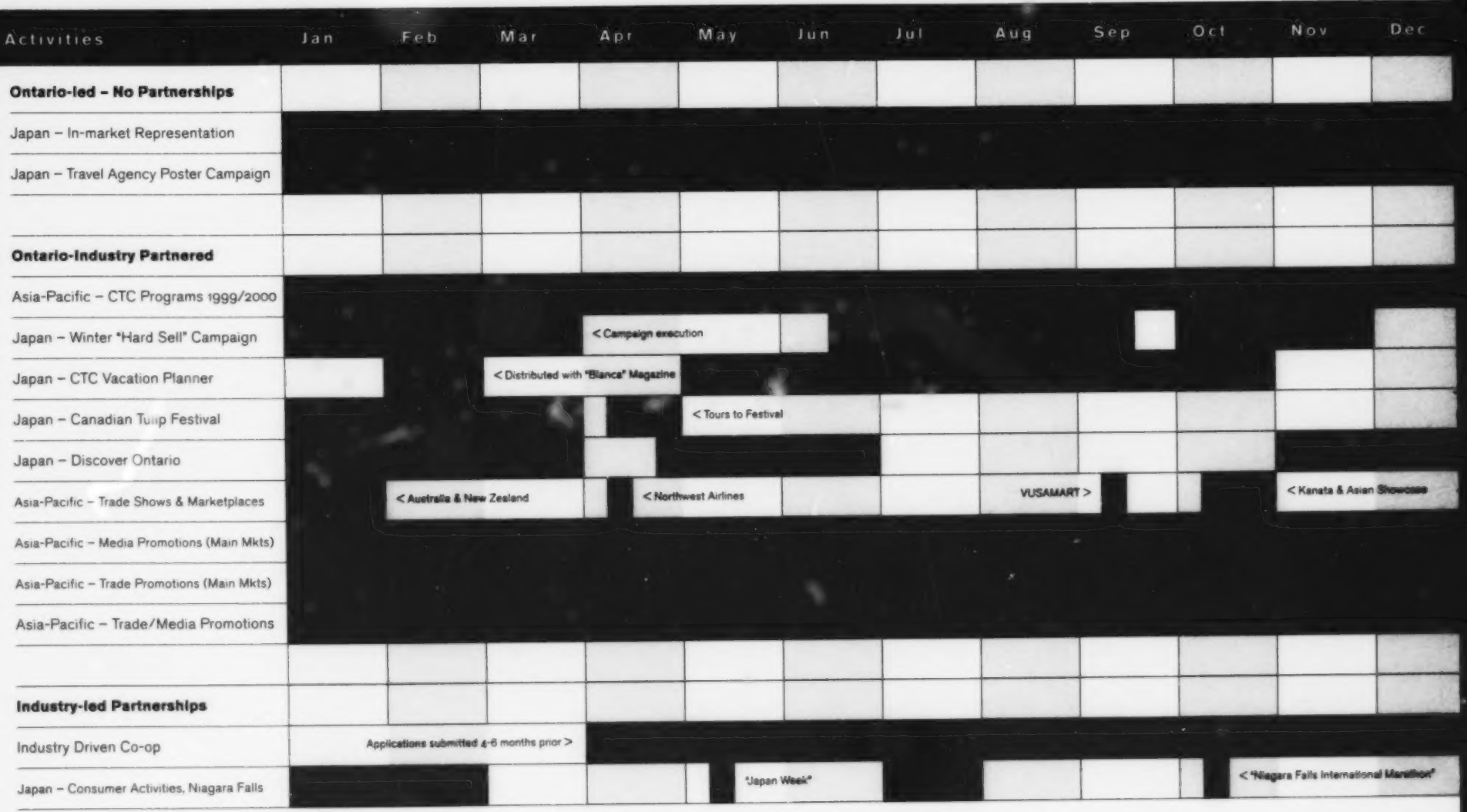
Asia Pacific Trade/Media Promotions: Emerging Markets	Asia Pacific Programs: Developing Markets (Taiwan, Hong Kong, Australia, New Zealand)
January – December 1999, Ongoing/Year-round: Positions Toronto/Ontario as Gateway to Eastern Canada; Highlights diversity of Ontario product to raise awareness among Asia-Pacific travel trade (tour operators, wholesalers)	**Year-round:** Image-building and awareness activities; Positions Toronto/Ontario as Gateway to Eastern Canada via participation in CTC publications (Vacation Planner, Canada Travel Guide, CTC newsletter), tour operators' brochures, media/PR campaigns, travel trade and consumer educational seminars (all Asia Pacific markets)
Directed to the third tier markets of South Korea, Thailand, Singapore, India, Philippines, Indonesia, Malaysia, China, etc.; Media & travel trade: These markets are serviced on an as-needed basis	Varies according to market area; Distribution to consumers, as well as trade activities, undertaken through CTC and tour operator programs
Increased awareness of key Ontario tourism product; Increased unpaid media coverage; Demonstration of MEDTT support of the CTC and Canadian carriers in these markets	Increased trade & consumer awareness and increased product demand; Increased awareness of seasonal product' Increased unpaid media and PR activities
Opportunity to provide in-kind services to media/travel trade familiarization tours from these areas; Occasionally, media and travel trade guests are hosted in conjunction with CTC/airline programs	Varies by market; CTC newsletter: $500-5,000; CTC publications: $1,000-10,000; Canada Touring program: To be determined; Trade and consumer educational seminars: Buy-in opportunity from $2,000; Display advertising available to partners (e.g., in transportation, accommodation) and through tour operators' brochures; As identified in CTC Asia Pacific marketing plan and MEDTT consultations with the industry; Consumer/trade advertising in partnership with CTC, airlines and tour operators
To be negotiated; No specific resources are allocated to these markets	Various cost options available; Program guidelines for 1999/2000 will be made available as programs are developed
As requested by program sponsors	As identified in CTC and Ontario Tourism marketing plans; CTC and Ontario Tourism are open to discussion of strategic partnership opportunities in Taiwan, Hong Kong, Australia/New Zealand
	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca

Asia-Pacific Media Promotions: Main Markets – press tours, media promotions & CTC editorial campaign	Asia-Pacific Trade Promotions – Trade Advertising & Familiarization tours
January-December 1999: Working with in-market representatives and CTC offices, undertake individual & joint ventures to increase awareness of Ontario as a tourist destination; Provide detailed, unique itineraries to entice media to choose Ontario as a preferred destination for specific articles; Provide press tours (consumer & trade media) to Ontario to increase unpaid media coverage.; Promote new airline routes; Themes target Ontario as a multi-season destination; Continue to promote icons, in conjunction with city, shopping and theatre/culture theme; Current expansion beyond the Maple Route to include Resorts/Muskoka, Algonquin Park and wilderness/soft adventure	**January – December 1999/Ongoing, Year-round:** Establishes Ontario as Gateway to Canada; Highlights diversity of Ontario product to Asia-Pacific travel trade (tour operators, wholesalers); Goal is to familiarize Asia-Pacific travel trade with breadth of Province's tourism offerings, to facilitate the inclusion of Ontario product in their promotions/sales of individual & group tour packages
Traditional media: TV, print & newspaper; but also high-end niche/lifestyle & Internet	Components include promotional video, travel trade manual (distributed directly to key trade clients), educational visits and seminars, client consultation; Familiarization tours are delivered province-wide (general promotion and as identified by travel trade requests)
Increased consumer awareness of Ontario tourism product (beyond Maple Route); Third party endorsement for tourism products; Increased unpaid media coverage	Improved knowledge of Ontario's product offerings; Increased Ontario product in key Asia-Pacific tour operator brochures; Increased purchase of Ontario tourism product
Partners can synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs	**Advertising:** Opportunities exist for major tourism industry suppliers (Negotiated on per project basis) **Familiarization tours:** Through either request or through targeting of specific travel trade, the opportunity is to develop tour and host travel parties; Industry may also identify markets/business that they would be interested in approaching (This should be undertaken under "Industry-Driven Initiatives," where consideration would be given to marketing consortia (with all partners identified); Preference will be given to shoulder & winter months & new product
Typically in-kind services and cash on an as-needed basis – negotiated on per project basis	**Familiarization Tours:** Typically in-kind services, and cash on as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
Partners with four-season product(s) can indicate availability of in-kind services and willingness to host tours/events	Depending on nature of tour (request or pro-active), partners would be advised of forthcoming tours at least 2 months prior to initiative
John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

Asia-Pacific Trade/Media Promotions: Emerging Markets	Asia Pacific Programs, Developing Markets (Taiwan, Hong Kong, Australia, New Zealand)
January – December 1999, Ongoing/Year-round: Positions Toronto/Ontario as Gateway to Eastern Canada; Highlights diversity of Ontario product to raise awareness among Asia-Pacific travel trade (tour operators, wholesalers)	**Year-round:** Image-building and awareness activities; Positions Toronto/Ontario as Gateway to Eastern Canada via participation in CTC publications (Vacation Planner, Canada Travel Guide, CTC newsletter), tour operators' brochures, media/PR campaigns, travel trade and consumer educational seminars (all Asia Pacific markets)
Directed to the third tier markets of South Korea, Thailand, Singapore, India, Philippines, Indonesia, Malaysia, China, etc.; Media & travel trade: These markets are serviced on an as-needed basis	Varies according to market area; Distribution to consumers, as well as trade activities, undertaken through CTC and tour operator programs
Increased awareness of key Ontario tourism product; Increased unpaid media coverage; Demonstration of MEDTT support of the CTC and Canadian carriers in these markets	Increased trade & consumer awareness and increased product demand; Increased awareness of seasonal product' Increased unpaid media and PR activities
Opportunity to provide in-kind services to media/travel trade familiarization tours from these areas; Occasionally, media and travel trade guests are hosted in conjunction with CTC/airline programs	Varies by market; CTC newsletter: $500-5,000; CTC publications: $1,000-10,000; Canada Touring program: To be determined; Trade and consumer educational seminars: Buy-in opportunity from $2,000; Display advertising available to partners (e.g., in transportation, accommodation) and through tour operators' brochures; As identified in CTC Asia Pacific marketing plan and MEDTT consultations with the industry; Consumer/trade advertising in partnership with CTC, airlines and tour operators
To be negotiated; No specific resources are allocated to these markets	Various cost options available; Program guidelines for 1999/2000 will be made available as programs are developed
As requested by program sponsors	As identified in CTC and Ontario Tourism marketing plans; CTC and Ontario Tourism are open to discussion of strategic partnership opportunities in Taiwan, Hong Kong, Australia/New Zealand
	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca

Asia-Pacific Media Promotions: Main Markets – press tours, media promotions & CTC editorial campaign	Asia-Pacific Trade Promotions – Trade Advertising & Familiarization tours
January-December 1999: Working with in-market representatives and CTC offices, undertake individual & joint ventures to increase awareness of Ontario as a tourist destination; Provide detailed, unique itineraries to entice media to choose Ontario as a preferred destination for specific articles; Provide press tours (consumer & trade media) to Ontario to increase unpaid media coverage.: Promote new airline routes; Themes target Ontario as a multi-season destination; Continue to promote icons, in conjunction with city, shopping and theatre/culture theme; Current expansion beyond the Maple Route to include Resorts/Muskoka, Algonquin Park and wilderness/soft adventure	**January – December 1999/Ongoing, Year-round:** Establishes Ontario as Gateway to Canada; Highlights diversity of Ontario product to Asia-Pacific travel trade (tour operators, wholesalers); Goal is to familiarize Asia-Pacific travel trade with breadth of Province's tourism offerings, to facilitate the inclusion of Ontario product in their promotions/sales of individual & group tour packages
Traditional media: TV, print & newspaper; but also high-end niche/lifestyle & Internet	Components include promotional video, travel trade manual (distributed directly to key trade clients), educational visits and seminars, client consultation; Familiarization tours are delivered province-wide (general promotion and as identified by travel trade requests)
Increased consumer awareness of Ontario tourism product (beyond Maple Route); Third party endorsement for tourism products; Increased unpaid media coverage	Improved knowledge of Ontario's product offerings; Increased Ontario product in key Asia-Pacific tour operator brochures; Increased purchase of Ontario tourism product
Partners can synchronize media stories with consumer advertising & other promotional activities; Partners host media tours/events and cover all related costs	**Advertising:** Opportunities exist for major tourism industry suppliers (Negotiated on per project basis) **Familiarization tours:** Through either request or through targeting of specific travel trade, the opportunity is to develop tour and host travel parties; Industry may also identify markets/business that they would be interested in approaching (This should be undertaken under "Industry-Driven Initiatives," where consideration would be given to marketing consortia (with all partners identified); Preference will be given to shoulder & winter months & new product
Typically in-kind services and cash on an as-needed basis – negotiated on per project basis	**Familiarization Tours:** Typically in-kind services, and cash on as-needed basis – negotiated on per project basis; Partners can indicate availability of in-kind services and willingness to host tours
Partners with four-season product(s) can indicate availability of in-kind services and willingness to host tours/events	Depending on nature of tour (request or pro-active), partners would be advised of forthcoming tours at least 2 months prior to initiative
John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca	John Cole: 416-314-7566 E-mail: john.cole@edt.gov.on.ca or Brenda McIntosh: 416-314-5492 E-mail: brenda.mcintosh@edt.gov.on.ca

asia-pacific markets 1999 – blocking chart marketing activities by month



E

programs

Ontario Tourism's cross-market programs include a broad range of activities, resources and services used in all market sectors. Cross-market programs support the marketing, promotion, research and planning, and communication needs of Ontario Tourism. Operators can use cross-market programs and services to bundle a variety of resources – publications, co-op advertising, website support and other consumer fulfilment tactics – to build an integrated and cohesive marketing resource system. As in all other aspects of this marketing plan, cross-market programs for 1999 will be consumer-oriented and business-driven.

cross-market programs

Goals

- Fulfil Ontario's advertising efforts with high-quality consumer-friendly materials
- Creation of new channels of fulfilment distribution
- Provide industry partnering opportunities to extend marketing budgets, fulfilment support & topical tourism research
- Make the consumer's first service contact with Ontario Tourism a welcoming and helpful experience
- Build relationship with the consumer

Objectives

- Maintain and grow forums for interacting with travel trade (e.g. marketplaces).
- Development of "one-stop" shopping for advertising sales by bundling publications and paid media, including the development and delivery to partners of a comprehensive 18-24 month sales kit
- Increase partner participation in publication program
- Increase value for advertising dollar to partners by bundling products
- Conduct and disseminate up-to-date research
- Improve development and industry access to multi-media resources
- Improve customer service both to consumers and industry

Publication Strategy

The most visible cross-market program is Ontario Tourism's publications – fulfilment, promotional, and other information brochures. Much of this material is used throughout Ontario's tourism industry. In 1999, the Ontario Tourism partnership will implement a new publications strategy that aims to increase the value of these resources to tourism operators – providing better quality, higher impact and more efficient use of resources. All publications will be strongly consumer-focused, with messaging formats and style that are consistent with all other consumer-oriented communications, including advertising and public relations.

Expanded Website Support

Internet communications will be adopted as a cross-market initiative to serve as a primary fulfilment source. In early 1999, a new website will be developed with the goal of providing a direct 'gateway to Ontario.' The website seeks to consolidate the relationship between current MEDTT Tourism and Travelinx websites. Its purpose is to simplify and enhance the consumer's search for travel information, to provide continuity with other communications, and add value to these activities by providing consumers responsive, on-line support.

M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

Publications: Ontario Events Guide	Publications: Vacation Value Packages
2 editions: April 1999 (Spring/Summer/early Fall) & October 1999 (Fall/Winter/early Spring) A comprehensive listing of events & festivals across Ontario, with specially selected editorial content	**2 editions: March 1999 (Spring/Summer) & September 1999 (Fall/winter)** Published at the same time as Ontario Events Guide; Features accommodation packages that offer extra value to the consumer
Distributed as a companion piece with the Discovery Guide to domestic and short-haul US consumers, through 1-800-ONTARIO, Travel Information Centres and industry partners' tourism information centres; Distribution: April 1999 issue: 250,000; October 1999 issue: 150,000	Distributed as a companion piece with the Discovery Guide to domestic and US consumers, through 1-800-ONTARIO and Travel Information Centres. Distribution: March 1999 issue: 200,000; September 1999 issue: 100,000
Increased consumer knowledge of variety & diversity of events across Ontario; Decision making/purchases facilitated – consumers have information in-hand; Increased attendance at listed events; Repeat purchases and increased length of stay encouraged	Decision making/purchases facilitated – consumers have information in-hand; Increased room night bookings to partners; Increase in consumers' length of stay
Cost-effective means of promoting events and providing consumers with reasons to travel in/to Ontario; Events are listed in publications and on Ministry & TraveLinx websites	Cost-effective means of developing and promoting accommodation packages; Package prices are identified in $US & Cdn., and partners are required to maintain package prices for lifespan of publication (6 months); Distribution is handled by Ontario Tourism
Event listings are free; Advertising opportunities include display ads with prices ranging from $2000 – $5000	Cost for display ads range from $375 to $1600.
1999 Summer issue: Booking deadline: Feb 1st (summer), Aug 1st (winter), 1999; **2000 Summer issue:** Nov 1999; 2000 Winter Issue: Booking deadline June 2000	**1999 Spring/Summer issue:** Booking deadline January 15, 1999; **1999 Fall/Winter issue:** Booking deadline July 2, 1999; **2000 Spring/Summer issue:** Nov 1999; **2000 Fall/Winter issue:** June 2000
Fuel Media Sales: 416-484-6565	Fuel Media Sales: 416-484-6565

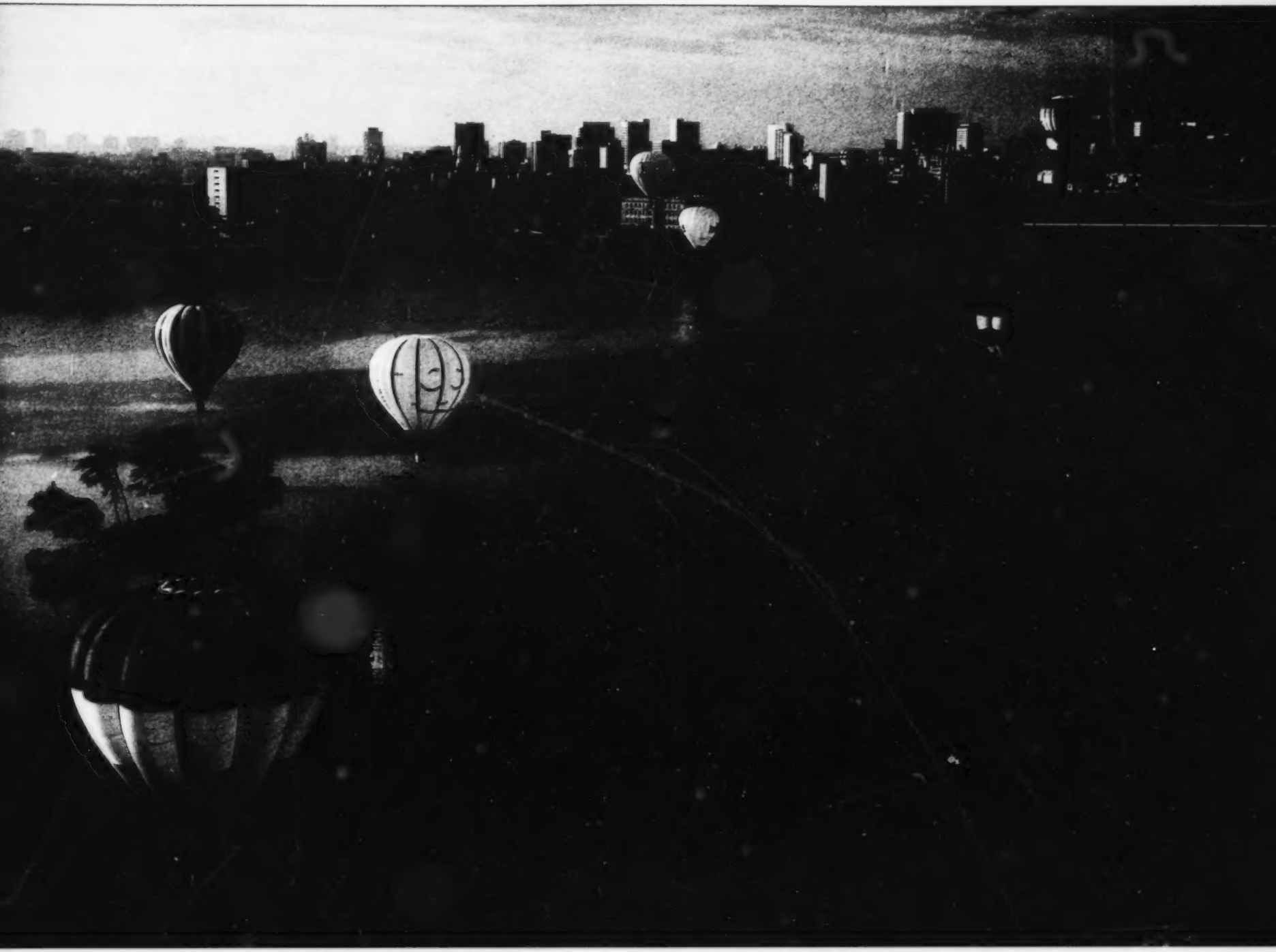
Publications – Consumer: Ontario Discovery Guide (formerly known as the Travel Planner)

	To be released March 1999: Totally redesigned annual flagship: A 'one-stop shopping' travel-consumer guide; A comprehensive document detailing accommodation and attractions in all provincial regions
	Distributed to domestic and US consumers through 1-800-ONTARIO, Travel Information Centres, travel trade, embassies, consulates and Ontario Tourism's tourism partners; Circulation 800,000
	Decision making/purchases facilitated – consumers have information in-hand; Increased consumer awareness of provincial product; Repeat purchases encouraged; Increase in overnight travel and frequency of trips
	Cost-effective means of promoting accommodations, attractions and tourist experiences; Provides consumers with detailed trip planning information and promotes reasons to stay longer; Industry can subsequently fulfil consumer inquiries directly
	Basic listings start at $250; Display advertising rate card available from publications agency (FUEL Inc.); Options for size and positions available upon request; Note: Cost of all listings (BGS) includes listing on Travelinx database
	Booking deadline December 4, 1998, for 1999/2000 edition, and early October 1999, for 2000/2001 edition
	Display advertising: Fuel Media Sales: 416-484-6565 Listings: TraveLinx Ontario, 1-800-263-9673

Publications: Ontario Events Guide	Publications: Vacation Value Packages
2 editions: April 1999 (Spring/Summer/early Fall) & October 1999 (Fall/Winter/early Spring) A comprehensive listing of events & festivals across Ontario, with specially selected editorial content	**2 editions: March 1999 (Spring/Summer) & September 1999 (Fall/winter)** Published at the same time as Ontario Events Guide; Features accommodation packages that offer extra value to the consumer
Distributed as a companion piece with the Discovery Guide to domestic and short-haul US consumers, through 1-800-ONTARIO, Travel Information Centres and industry partners' tourism information centres; Distribution: April 1999 Issue: 250,000; October 1999 issue: 150,000	Distributed as a companion piece with the Discovery Guide to domestic and US consumers, through 1-800-ONTARIO and Travel Information Centres. Distribution: March 1999 issue: 200,000; September 1999 issue: 100,000
Increased consumer knowledge of variety & diversity of events across Ontario; Decision making/purchases facilitated – consumers have information in-hand; Increased attendance at listed events; Repeat purchases and increased length of stay encouraged	Decision making/purchases facilitated – consumers have information in-hand; Increased room night bookings to partners; Increase in consumers' length of stay
Cost-effective means of promoting events and providing consumers with reasons to travel in/to Ontario; Events are listed in publications and on Ministry & TraveLinx websites	Cost-effective means of developing and promoting accommodation packages; Package prices are identified in $US & Cdn., and partners are required to maintain package prices for lifespan of publication (6 months); Distribution is handled by Ontario Tourism
Event listings are free; Advertising opportunities include display ads with prices ranging from $2000 – $5000	Cost for display ads range from $375 to $1600.
1999 Summer issue: Booking deadline: Feb 1st (summer), Aug 1st (winter), 1999; 2000 Summer issue: Nov 1999; 2000 Winter Issue: Booking deadline June 2000	**1999 Spring/Summer issue:** Booking deadline January 15, 1999; **1999 Fall/Winter issue:** Booking deadline July 2, 1999; **2000 Spring/Summer issue:** Nov 1999; **2000 Fall/Winter issue:** June 2000
Fuel Media Sales: 416-484-6565	Fuel Media Sales: 416-484-6565

cross-market programs

	Publications · Consumer · Ontario Discovery Guide (formerly known as the Travel Planner)
Timing/Message	**To be released March 1999:** Totally redesigned annual flagship: A 'one-stop shopping' travel-consumer guide; A comprehensive document detailing accommodation and attractions in all provincial regions
	Distributed to domestic and US consumers through 1-800-ONTARIO, Travel Information Centres, travel trade, embassies, consulates and Ontario Tourism's tourism partners; Circulation 800,000
Expected results	Decision making/purchases facilitated – consumers have information in-hand; Increased consumer awareness of provincial product; Repeat purchases encouraged; Increase in overnight travel and frequency of trips
	Cost-effective means of promoting accommodations, attractions and tourist experiences; Provides consumers with detailed trip planning information and promotes reasons to stay longer; Industry can subsequently fulfil consumer inquiries directly
Estimated cost	Basic listings start at $250; Display advertising rate card available from publications agency (FUEL Inc.); Options for size and positions available upon request; Note: Cost of all listings (BGS) includes listing on Travelinx database
	Booking deadline December 4, 1998, for 1999/2000 edition, and early October 1999, for 2000/2001 edition
Contact	Display advertising: Fuel Media Sales: 416-484-6565 Listings: TraveLinx Ontario, 1-800-263-9673



M121

IMPORTANT NOTE CONCERNING THE FOLLOWING PAGES

THE PAGES WHICH FOLLOW HAVE BEEN FILMED TWICE IN ORDER TO OBTAIN THE BEST REPRODUCTIVE QUALITY

USERS SHOULD CONSULT ALL THE PAGES REPRODUCED ON THE FICHE IN ORDER TO OBTAIN A COMPLETE READING OF THE TEXT.

REMARQUE IMPORTANTE CONCERNANT LES PAGES QUI SUIVENT

LES PAGES SUIVANTES ONT ÉTÉ REPRODUITES EN DOUBLE AFIN D'AMÉLIORER LA QUALITÉ DE REPRODUCTION

LES UTILISATEURS DOIVENT CONSULTER TOUTES LES PAGES REPRODUITES SUR LA FICHE AFIN D'OBTENIR LA LECTURE DU TEXTE INTÉGRAL

micromedia
a division of IHS Canada

20 Victoria Street
Toronto, Ontario M5C 2N8
Tel.: (416) 362-5211
Toll Free: 1-800-387-2689
Fax: (416) 362-6161
Email: info@micromedia.on.ca

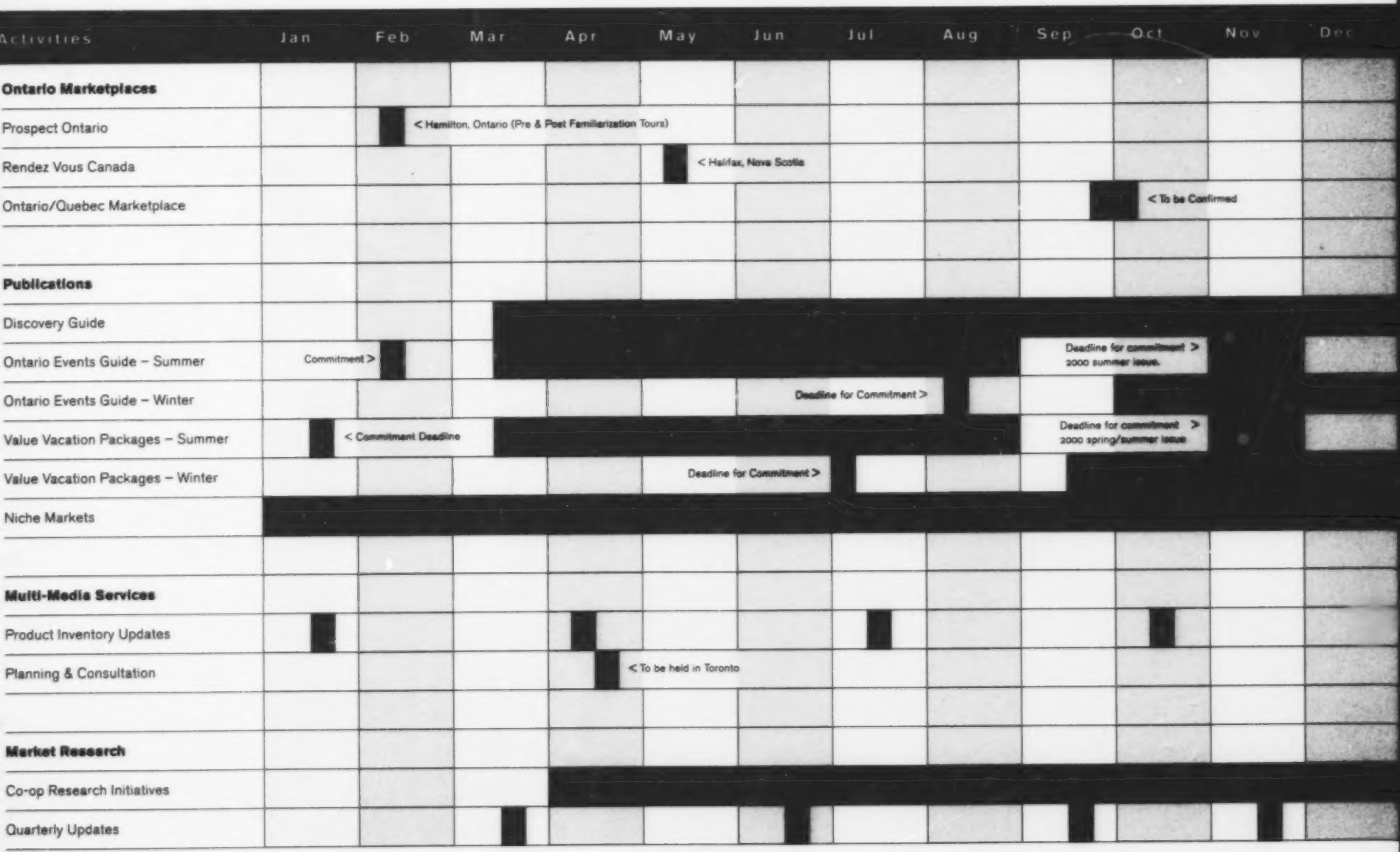
Multi-Media Services	Market Research
Activities include: Video stock leasing: Fulfilment of request for footage on a fee-for-service basis; Ontario Tourism Marketing Partnership Website: Establishment of Internet/Intranet presence, Creative image acquisition: Photography, film and video in support of all promotional activities	Activities include: advertising research; consumer research; niche markets (Analysis and development of consumer profiles of niche product users and how to market to them); Travel trends & economic environment: Travel volumes & expenditures, economic impacts, market analyses & economic environment tracking
Province-wide; Focus determined by geographic market product architecture; Application in all markets	All geographic markets: Travel trends, consumers, market segments, economic environment, all marketing activities
Fulfilment of service requests; Increased efficiency in partners' resource allocation; Initiation of revenue generation through leasing	Partners will have up-to-date research to develop programs and measure program performance; Industry will become better informed of market trends & industry performance through regular updates from Ontario Tourism
Partners: VCBs, Associations, DMOs; Availability of 'one-stop shop' for creative resources required for marketing and promotion materials	Co-op research Initiatives: Ontario Tourism will leverage its position as a major research buyer and undertake joint research with industry partners; Research can be either consumer- or niche-oriented; Partners can purchase components/questions in advertising, consumer tracking; Related customized reports can be explored
Negotiated as required/identified	Negotiated as identified/required
Quarterly product inventory updates, within 10 days of end of quarter; Consultation on key multimedia/product issues with industry partners: mid April 1999, in Toronto (location & meeting details will be announced through NewsFax.; Attendance to be confirmed by Feb 28 1999; Depending on initiative, cash & in-kind services on a per project basis	Bi-weekly e-mail updates will be available beginning in March 1999
John Opiola : 416-314-7353 E-mail: john.opiola@edt.gov.on.ca	Brian Singh: 416-314-7551 E-mail: brian.singh@edt.gov.on.ca

Niche market Publications Adventure Guide, Fishing Guide, Ontario's Snow Country & other niche publications	Travel Information Centres
Publications available on seasonal basis, approximately 2 months (where applicable) prior to activity: Annual publications highlighting specific niche product; Comprehensive guides provide details on exciting niche product unique to Ontario, and show how consumers can realize these experiences	Ontario Tourism operates 18 provincial Travel Information Centres (TICs) in Ontario (11 open year-round, 7 seasonal); TICs present a major opportunity for the distribution of travel information and counselling in conjunction with the province's overall tourism marketing activities
Distributed to domestic and US consumers as a companion to the Discovery Guide; in response to advertising campaigns & other promotional initiatives (e.g., trade shows); and through partners' toll-free services and information centres; Circulation varies according to publication	Tourism operators can place their brochures in key TICs to promote specific products and experiences
Increased consumer knowledge of variety & diversity of niche experiences across Ontario; Decision making/purchases facilitated – consumers have information in-hand; Increased participation in niche products and experiences	Decision making/purchases facilitated - consumers have information in-hand; Increased length of stay and repeat visits encouraged; Consumers' product knowledge enhanced
Promote niche product availability and accessibility via listings, advertorial and display advertising, with an emphasis on accommodation packages	
To be determined; Each publication has a different listing and advertising rate structure; Rate cards available from publications agency (FUEL Inc.)	High value brochure racking opportunity (To be determined); Partners pay shipping costs to deliver brochures to TICs
Booking deadline: Typically 3 months prior to publication	
Fuel Media Sales: 416-484-6565	Northern, Central and Eastern Ontario: Ruth Parkes: 705-725-7280 Southwestern Ontario/Niagara: Jackie Philip: 905-358-3221

Multi-Media Services	Market Research
Activities include: Video stock leasing: Fulfilment of request for footage on a fee-for-service basis; Ontario Tourism Marketing Partnership Website: Establishment of Internet/Intranet presence, Creative image acquisition: Photography, film and video in support of all promotional activities	Activities include: advertising research; consumer research; niche markets (Analysis and development of consumer profiles of niche product users and how to market to them); Travel trends & economic environment: Travel volumes & expenditures, economic impacts, market analyses & economic environment tracking
Province-wide; Focus determined by geographic market product architecture; Application in all markets	All geographic markets: Travel trends, consumers, market segments, economic environment, all marketing activities
Fulfilment of service requests; Increased efficiency in partners' resource allocation; Initiation of revenue generation through leasing	Partners will have up-to-date research to develop programs and measure program performance; Industry will become better informed of market trends & industry performance through regular updates from Ontario Tourism
Partners: VCBs, Associations, DMOs; Availability of 'one-stop shop' for creative resources required for marketing and promotion materials	Co-op research Initiatives: Ontario Tourism will leverage its position as a major research buyer and undertake joint research with industry partners; Research can be either consumer- or niche-oriented; Partners can purchase components/questions in advertising, consumer tracking; Related customized reports can be explored
Negotiated as required/identified	Negotiated as identified/required
Quarterly product inventory updates, within 10 days of end of quarter; Consultation on key multimedia/product issues with industry partners: mid April 1999, in Toronto (location & meeting details will be announced through NewsFax.; Attendance to be confirmed by Feb 28 1999; Depending on initiative, cash & in-kind services on a per project basis	Bi-weekly e-mail updates will be available beginning in March 1999
John Opiola : 416-314-7353 E-mail: john.opiola@edt.gov.on.ca	Brian Singh: 416-314-7551 E-mail: brian.singh@edt.gov.on.ca

Niche market Publications Adventure Guide, Fishing Guide, Ontario's Snow Country & other niche publications	Travel Information Centres
Publications available on seasonal basis, approximately 2 months (where applicable) prior to activity: Annual publications highlighting specific niche product; Comprehensive guides provide details on exciting niche product unique to Ontario, and show how consumers can realize these experiences	Ontario Tourism operates 18 provincial Travel Information Centres (TICs) in Ontario (11 open year-round, 7 seasonal); TICs present a major opportunity for the distribution of travel information and counselling in conjunction with the province's overall tourism marketing activities
Distributed to domestic and US consumers as a companion to the Discovery Guide; in response to advertising campaigns & other promotional initiatives (e.g., trade shows); and through partners' toll-free services and information centres; Circulation varies according to publication	Tourism operators can place their brochures in key TICs to promote specific products and experiences
Increased consumer knowledge of variety & diversity of niche experiences across Ontario; Decision making/purchases facilitated – consumers have information in-hand; Increased participation in niche products and experiences	Decision making/purchases facilitated - consumers have information in-hand; Increased length of stay and repeat visits encouraged; Consumers' product knowledge enhanced
Promote niche product availability and accessibility via listings, advertorial and display advertising, with an emphasis on accommodation packages	
To be determined; Each publication has a different listing and advertising rate structure; Rate cards available from publications agency (FUEL Inc.)	High value brochure racking opportunity (To be determined); Partners pay shipping costs to deliver brochures to TICs
Booking deadline: Typically 3 months prior to publication	
Fuel Media Sales: 416-484-6565	Northern, Central and Eastern Ontario: Ruth Parkes: 705-725-7280 Southwestern Ontario/Niagara: Jackie Philip: 905-358-3221

1999 program schedule **Overseas Marketplaces/Ontario/Canada-based**

	Prospect Ontario	Rendez Vous	Ontario-Quebec Marketplace
Date	Feb 7-9, 1999	May 9-12 1999	Sep-Oct 1998 (To be confirmed)
Location	Hamilton ON	Halifax NS	Ontario
Target Audience	Travel trade	Travel trade, Media	Travel trade, Media
Description	Opportunity for 85-95 Ontario tourism suppliers to meet with approx. 70 receptive operators from North America who deal in overseas markets; 1 1/2 day marketplace; Pre- and post-familiarization trips provide product testing opportunities	Canada's premier tourism marketplace; 385 buyers from around the world will meet in a business forum with approx. 700 Canadian suppliers (70 from Ontario)	Approx. 70 international tour operators and media from 27 countries are invited to participate in a 1 1/2 day show/business forum with Ontario tourism suppliers; Pre- and post-familiarization trips provide product testing opportunities
Partner cost	Approx. $Cdn 2,000; Organized by Ontario Tourism	Registration: Approx. $Cdn. 2,000; Organized by the Tourism Industry Association of Canada (TIAC)	Registration: Approx. $Cdn 850; Organized by Ontario Tourism
Contact	Paulette Clarke, 416-314-7572 E-mail: paulette.clarke@edt.gov.on.ca	Paulette Clarke, 416-314-7572 E-mail: paulette.clarke@edt.gov.on.ca	Paulette Clarke, 416-314-7572 E-mail: paulette.clarke@edt.gov.on.ca

cross-market activities 1999 – blocking chart marketing activities by month